

## The Menu Options

Click on a menu option word to jump to that item, or you can scroll through the document.

Menu Options	
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<a href="#">Add Document to Submitted Filing</a>	<a href="#">Add Document to Submitted Filing</a>
<a href="#">Make or View Payments</a>	<a href="#">Make Payments</a> • <a href="#">e-check</a> • <a href="#">credit card</a> • <a href="#">paper check</a> <a href="#">View Payments</a>
<a href="#">View Submitted Filing</a>	<a href="#">View Submitted Filings</a>
<a href="#">Amend a Submitted Filing</a>	<a href="#">Amend Filing</a>
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<a href="#">Secondary User</a>	<a href="#">Secondary Users</a>

### Submit Filing

This option allows you to fill out and submit your Annual Report. Please see our separate instructions on filling out the Annual Report.

### Add Document to Submitted (Existing) Filing

To file required documents after filing your Annual Report (such as audited financial statements), use this feature. First, select the appropriate year, then click the *Continue* button.

#### Add Documents to an Existing Filing

Use this to add a document such as the Audited Financial Statement that was not due at the time the Annual Report was submitted.

Select the year of the submitted filing you want to add documents.

**Note:** To amend data input previously submitted on the Annual Report form access the following link to [Amend a Submitted Filing](#)

Please see our *Attaching Documents to the Annual Report* instructions to see how the upload process works.

# The Washington OIC Web Portal Menu Options

## Make Payments

This is an **example**. The process is similar for other types of organizations, but the fee amounts and due dates may differ. For Charitable Gift Annuities only, see the [last page of this document](#) for specific information about the CGA fee structure.

The *State of Domicile* field is for retaliatory fees.

To pay, click the checkbox(es) below *Select to Pay* for the fees that you will pay now, then click the *Make Payment* link. If you need to show someone at your organization an invoice in order to authorize a payment, click the *Print Invoice* link.

**For your convenience, you may pay fees prior to the due date.**

Payments Due					
Type	State of Domicile	State of Washington	Balance Due	Due On	Select to Pay
Filing Fee for 2014	<input type="text" value="\$0.00"/>	\$20.00	\$20.00	03/02/2015	<input type="checkbox"/>
Renewal Fee for 07/01/2015-06/30/2016 (\$200) Non-Vehicle	<input type="text" value="\$0.00"/>	\$200.00	\$200.00	06/30/2015	<input type="checkbox"/>

[Print Invoice](#)   [Make Payment](#)

In this example, the company chose to pay its renewal fee early, at the same time as its filing fee.

The top portion of the payment screen shows the Balance Due and the Due Date.

Payment Detail	
Filing Fee for 2014	\$20.00
Renewal Fee for 07/01/2015-06/30/2016 (\$200) Non-Vehicle	\$200.00
Less Payments Made	\$0.00
<b>Balance due in our office on or before 03/02/2015</b>	<b>\$220.00</b>

### You have three payment options:

- e-Check (deducts the amount from your bank account)
- credit card
- paper check

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To pay by e-Check, fill in all of your account information and click the *Next* button.

Amount	\$ 220.00
Account Details *	Business Account ▼
Account Type *	Checking Account ▼
Bank Routing # *	<input type="text"/>
Account # *	<input type="text"/>
Re-enter Account # *	<input type="text"/>
Name on the Account *	<input type="text"/>
Email Receipt To *	<input type="text"/>

Please make sure that your financial institution will not block our Electronic Funds Transfer debit.

**WARNING: Please verify with your bank that your account does not have a block against Debit EFT transactions.**

At the confirmation screen, please review for accuracy. **Please note that you can't change the date that the payment takes place, but for regulatory purposes the payment date is the day that you authorize payment.** If everything is correct, check the box to authorize the payment and click the *Process* button.

I authorize the Insurance Commissioner to charge \$ 220.00 to my Bank account on 01/12/2015 \*

After processing, the screen will confirm payment.

### Confirmation

Thank you for your payment of \$220.00.

The system will also send an email to the address that you provided. It looks something like this:

Subject: Payment Receipt: WAOIC# [REDACTED]

[REDACTED]

Thank you for using OIC's Online Services. Displayed below are your e-Check payment details.

- Payment Detail: Filing Fee for 2014; Renewal Fee for 07/01/2015-06/30/2016
- Total Amount Paid: \$220.00
- Account Number: XXXXXXXXXXXX-0856
- Routing Number: [REDACTED]
- Payment Date: 01/08/2015 (*this is the date your payment is considered received*)
- Expected Debit Date: 01/12/2015
- Transaction Detail #: 364172
- WAOIC #: [REDACTED]

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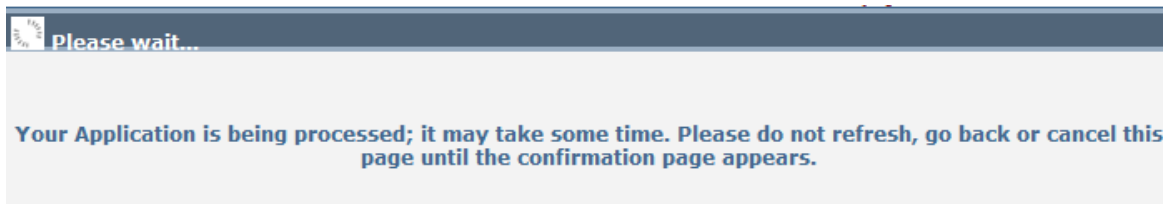
Or, to pay by credit card, click *Pay by credit card*. Fill in the required data and click the *Next* button.

**Payment Details**

(If you have a company credit card without First and Last Name, enter the name in the First Name field and the word "Company" in the Last Name field.)

Cardholder First Name *	<input type="text"/>	Cardholder Last Name *	<input type="text" value="Company"/>	Amount	<b>\$100.00</b>
Credit Card # *	<input type="text"/>	Credit Card Type *	<input type="text" value="American Express"/>		
(without dashes or spaces)					
Expiry Date *	<input type="text" value="March"/> <input type="text" value="2034"/>	CVV # *	<input type="text" value="4081"/> <a href="#">What is CVV?</a>		
Billing Street *	<input type="text" value="1122 Boogie Woogie Avenue"/>	Billing City *	<input type="text" value="New Orleans"/>		
Country *	<input type="text" value="United States"/>	State/Province *	<input type="text" value="Louisiana"/>		
Zip Code *	<input type="text" value="70130"/>	E-mail *	<input type="text"/>		

You'll move to a confirmation screen. If everything is correct, click the *Process* button. Otherwise, click the *Back* button to go back and make corrections.



After processing, the screen will confirm payment.



The system will also send an email with the transaction detail to the address that you provided.

**To pay with a paper check**, click the *Pay by paper check* link. This will print an invoice along with mailing instructions.

# The Washington OIC Web Portal Menu Options

## View Payments

You may view your payment history, which includes payments previously made under our e-Tax system. Click the *Filter by Year Billed* drop-down box to select a year, or choose “All” to see everything available.

Here’s the example of the above payment:

Payment History		
Type	Amount	Paid On
Filing Fee-2014	\$20.00	01/08/2015
Renewal Fee for 07/01/2015-06/30/2016	\$200.00	01/08/2015
Premium Tax Q4-2013	\$220.00	03/03/2014
Premium Tax Q4-2012	\$220.00	03/04/2013
Premium Tax Q4-2011	\$220.00	03/01/2012
Premium Tax Q4-2010	\$220.00	05/11/2011

## View Submitted Filings

This option allows you to view documents that you’ve filed in the past. Click the link in the *Date Entered* column to open it.

Submitted Annual Reports and Supporting Documents			
Date Entered	Filing for Year	Name	Description for Amendment
<a href="#">12/18/2014</a>	2013	ANNUAL REPORT	AMENDED FILING # 1
<a href="#">12/18/2014</a>	2013	IRS FORM 990	WE RECEIVED A FILING EXTENSION FROM THE IRS.
<a href="#">12/18/2014</a>	2013	AUDITED FINANCIAL STATEMENT	OUR AUDITOR NEEDED MORE TIME TO PREPARE THESE.
<a href="#">12/18/2014</a>	2013	BANK/BROKERAGE STATEMENT - SEPARATE RESERVE FUND (SRF)	THIS VERSION HAS THE PAGES TURNED THE CORRECT WAY.
<a href="#">12/18/2014</a>	2013	WA CGA CONTRACTS OUTSTANDING (SAC)	INCLUDES ALL WASHINGTON RESIDENTS.
<a href="#">12/18/2014</a>	2013	ANNUAL REPORT ATTESTATION	THIS DOCUMENT HAS A BETTER SCAN THAN PREVIOUSLY.
<a href="#">12/18/2014</a>	2013	ACTUARIAL CERTIFICATION	JUST BECAME AVAILABLE TODAY.
<a href="#">12/18/2014</a>	2013	ANNUAL REPORT	

# The Washington OIC Web Portal Menu Options

## Amend Filing

After the OIC accepts your Annual Report, use this option to make changes to the information in the Annual Report. If you are solely filing documents that go along with your Annual Report, please use the [Add Document to Submitted Filing](#) option instead (explained later).

**Select Filing Year**

Select the year of the submitted filing you want to amend.

## Change Password

Please refer to the Passwords section in our *Accessing the Portal* instructions.

**Change Password**

Password must be between 8 and 16 characters, and must have at least two numbers and one letter.

Old Password *	<input type="text"/>
New Password *	<input type="text"/>
Confirm New Password *	<input type="text"/>

## Update Contact Information

Allows you to update the **primary** Financial Statement contact person data. This updates the official OIC records.

**Primary Contact Information**

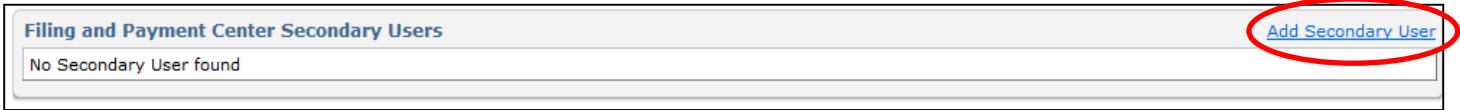
Contact Person * <input type="text" value="Robert Ellis Orrall"/>		
Street 1 * <input type="text" value="PO Box 8888888888"/>	Street 2 <input type="text"/>	
City * <input type="text" value="Valley Forge"/>	Country * <input type="text" value="United States"/>	
State/Province * <input type="text" value="Pennsylvania"/>	Zip * <input type="text" value="11111"/>	
Email * <input type="text" value="[REDACTED]"/>		
Phone # - Ext * <input type="text" value="000-555-0000"/> - <input type="text" value="2281"/>	Fax <input type="text"/>	Other Phone # <input type="text"/>

# The Washington OIC Web Portal Menu Options

## Secondary Users

You can set up other users who can make payments, file documents, or both. You control their access (meaning whether they have any rights and what those rights are).

To add users, click the *Add Secondary User* link.



Filing and Payment Center Secondary Users [Add Secondary User](#)

No Secondary User found

Enter the person's name and email address, then click the *Save* button.



**User Information**

The Secondary User ID is system generated. An email will be sent to the secondary user with login credentials.

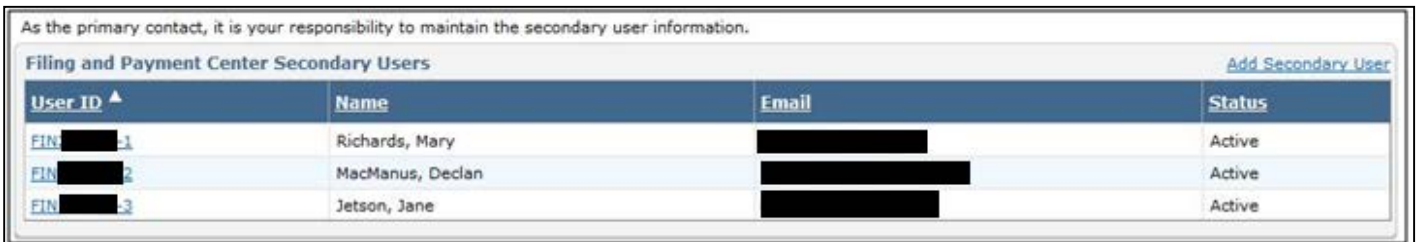
This person can use the following: \* Payment and Filing Functions ▾

Last Name \* Richards First Name \* Mary Middle Initial

Email \*

Confirm Email \*

The system lists all of your secondary users. The primary contact is the only person who can edit secondary users' information and rights.

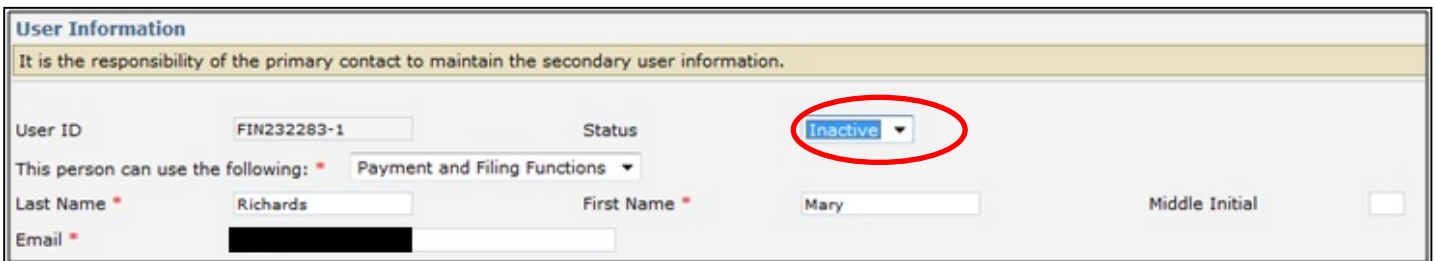


As the primary contact, it is your responsibility to maintain the secondary user information.

Filing and Payment Center Secondary Users [Add Secondary User](#)

User ID ▲	Name	Email	Status
FIN [REDACTED]-1	Richards, Mary	[REDACTED]	Active
FIN [REDACTED]-2	MacManus, Declan	[REDACTED]	Active
FIN [REDACTED]-3	Jetson, Jane	[REDACTED]	Active

To edit a user, click on their User ID link. You can change their name, email address, assigned functions, and inactivate/reactivate them.



**User Information**

It is the responsibility of the primary contact to maintain the secondary user information.

User ID FIN232283-1 Status **Inactive** ▾

This person can use the following: \* Payment and Filing Functions ▾

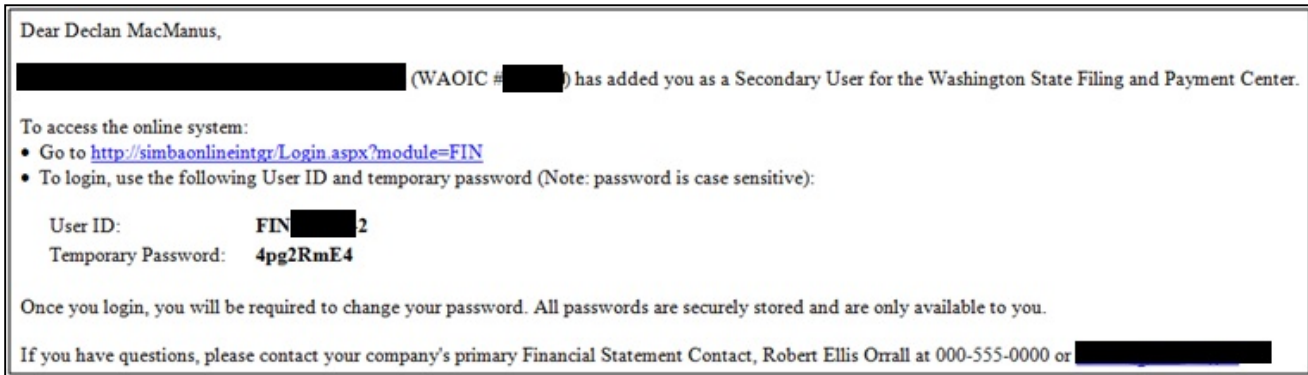
Last Name \* Richards First Name \* Mary Middle Initial

Email \*



## The Washington OIC Web Portal Menu Options

The first time that you set up a secondary user, our system will send them an email with their User ID and password. No email is sent if you edit the data for a secondary user.



Secondary users have different menu options, depending upon what rights are assigned to them:

Both payments and filing rights:

Menu Options
Submit Filing
Add Document to Submitted Filing
Make or View Payments
View Submitted Filing
Amend a Submitted Filing
Change Password

Payments only:

Menu Options
Make or View Payments
Change Password

Filings only:

Menu Options
Submit Filing
Add Document to Submitted Filing
View Submitted Filing
Amend a Submitted Filing
Change Password

Secondary users can only change their own password.



## The Washington OIC Web Portal Menu Options

### For Charitable Gift Annuities only

In addition to the Annual Filing Fee, there is a fee for each new annuity issued in Washington during the fiscal year.

If you have already filed the Annual Report, our system will fill in the number of new Washington annuities for you (the figure comes from your Annual Report). If that figure is not correct, then you must amend the Annual Report to change the figure.

In the example below, the Annual Report has not been filed, so in this case you must enter the number of new annuities issued in Washington in order to pay the proper amount of fees. The system then recalculates the total Balance Due.

Payments Due						
Type	Annual Filing Fee	New Annuities Issued in Washington State		Balance Due	Due On	Select to Pay
Filing Fee for 2014	\$25.00	<input type="text" value="15"/>	X \$5.00 = \$75.00	\$100.00	03/01/2015	<input checked="" type="checkbox"/>
						<a href="#">Print Invoice</a> <a href="#">Make Payment</a>