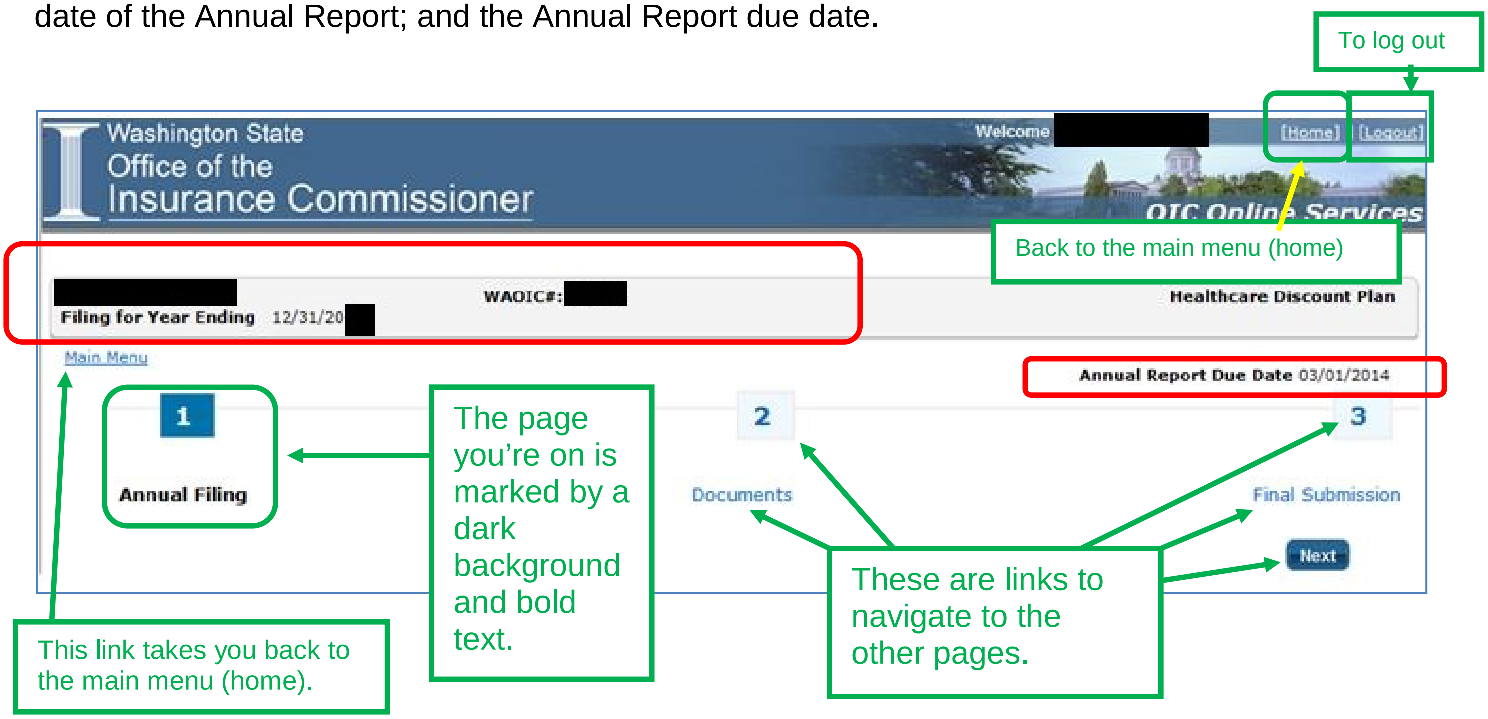
How to fill out the OIC Discount Plan Organization Annual Report

This training material will help guide you through the steps to make your Discount Plan Organization Annual Report filing with the OIC. The Annual Report is an on-line form where you fill in the information and upload attachments.

We created this training material on a test site. The actual site may look different.

The beige banner near the top shows:
Your company name; WAOIC number;
date of the Annual Report; and the Annual Report due date.



At the bottom of the page, notice the *Save* button.

You can save your work and return later to continue. In addition, the system times out after a period of inactivity. This would cause you to lose any unsaved work.

You can print your Annual Report to a PDF file using the *Print* button. Please note that it will only print what you have saved. So generally, you'll want to save before you print.

The *Validate Filing* button will check to ensure that every required item has a response. If you haven't been to pages 2 or 3 yet, you will get validation errors for things you haven't seen yet. We recommend clicking the *Validate Filing* button when you believe that you've responded to every item and attached all the required documents.

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Here's what the Annual Report looks like:

1 **Annual Filing** | 2 Documents | 3 Final Submission

Next

Annual Report of Licensed Discount Plan Organizations (DPOs)

1. The net worth of the DPO as of 12/31/2013

$0

2. How does the DPO meet its RCW 48.155.040 surety bond requirement?

Member Transactions

Provide detail of all Washington transactions for the year ending 12/31/2013

	Funds Received	Funds Disbursed
Aggregate for All Washington Members	$0	$0
Aggregate for All Washington Prospective Members	$0	$0

Provider and Network Transactions

Provide detail of all Washington transactions for the year ending 12/31/2013

	Funds Received	Funds Disbursed
Aggregate for All Washington Individual Providers	$0	$0

Provide detail of all Washington Provider Networks having transactions for the year ending 12/31/2013

Add Network

Network Name	Funds Received	Funds Disbursed	
	$0	$0	Delete

Member Counts

1. The number of members the DPO has in Washington as of 12/31/2013

0

2. The total number of members the DPO has as of 12/31/2013

0

Conflict of Interest

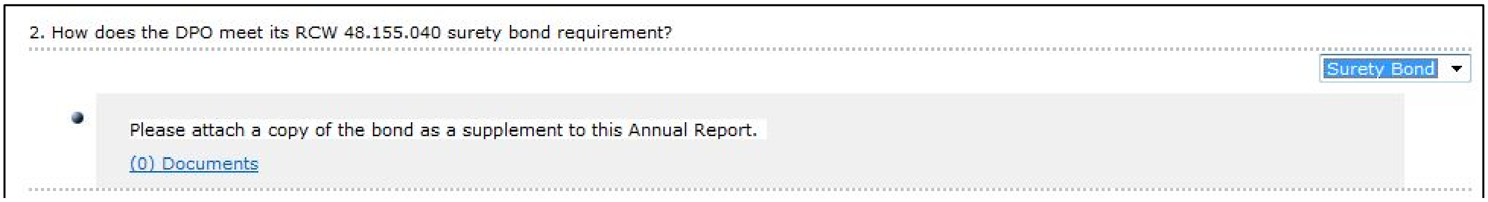
Have the people responsible for conduct of the organization's affairs, or the information related to those people, changed since the most recent disclosure provided in the initial license application, license renewal, or Annual Report?

- Yes
- No

Print | Validate Filing | Save | Next

Flexible Format

Certain responses may ask for more information, or documents. For example, after selecting *Surety Bond*, a copy of the surety bond becomes a required document that must be filed with this Annual Report.


2. How does the DPO meet its RCW 48.155.040 surety bond requirement?

Surety Bond

- Please attach a copy of the bond as a supplement to this Annual Report.

  (0) Documents

Provider and Network Transactions

Enter the total of the Funds Received and Funds Disbursed for all Washington Individual Providers. Then, enter the name of your network, the funds received, and funds dispersed.

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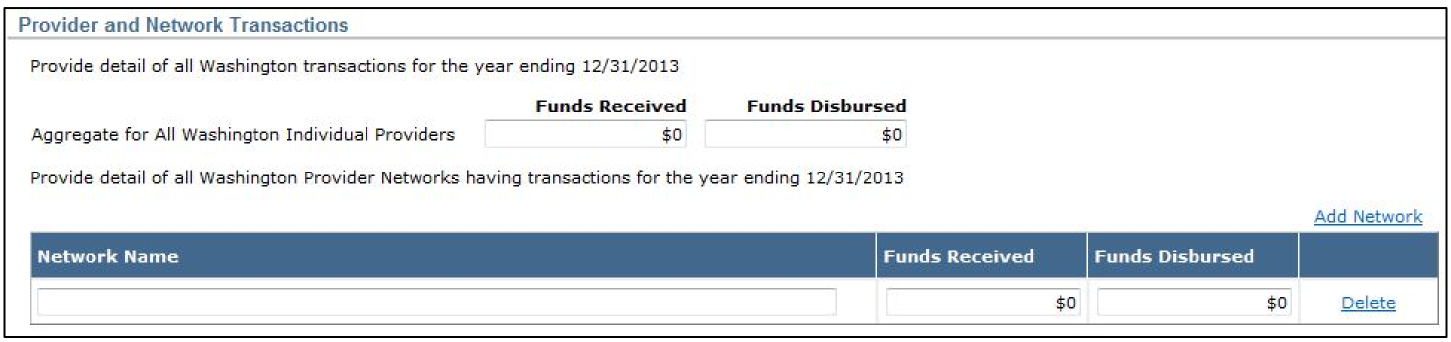

Provider and Network Transactions

Provide detail of all Washington transactions for the year ending 12/31/2013

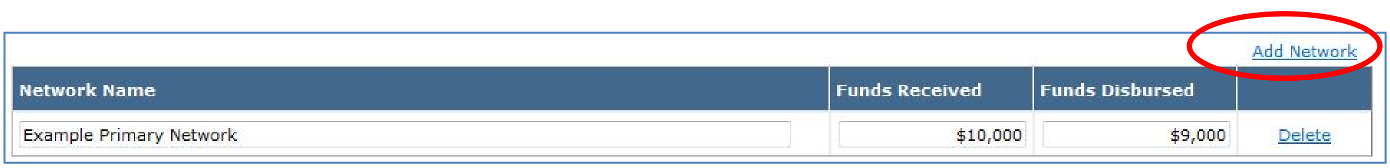
	Funds Received	Funds Disbursed
Aggregate for All Washington Individual Providers	$0	$0

Provide detail of all Washington Provider Networks having transactions for the year ending 12/31/2013

Add Network

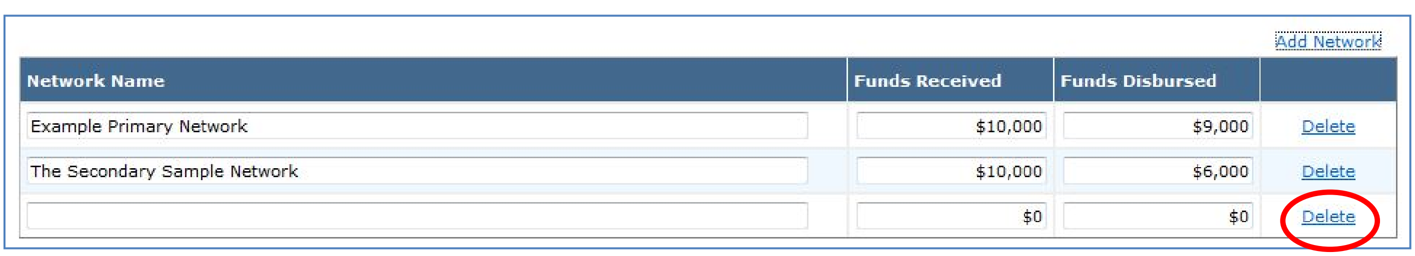
Network Name	Funds Received	Funds Disbursed	
	$0	$0	Delete

If you have more than one network to enter, click the *Add Network* link. Each time you click the link, it will add an additional line.


Add Network

Network Name	Funds Received	Funds Disbursed	
Example Primary Network	$10,000	$9,000	Delete

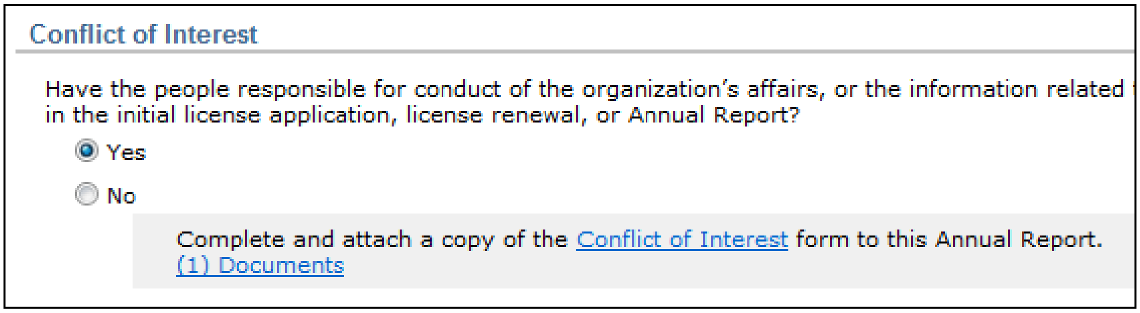
Click the *Delete* link to remove an unneeded row.


Add Network

Network Name	Funds Received	Funds Disbursed	
Example Primary Network	$10,000	$9,000	Delete
The Secondary Sample Network	$10,000	$6,000	Delete
	$0	$0	Delete

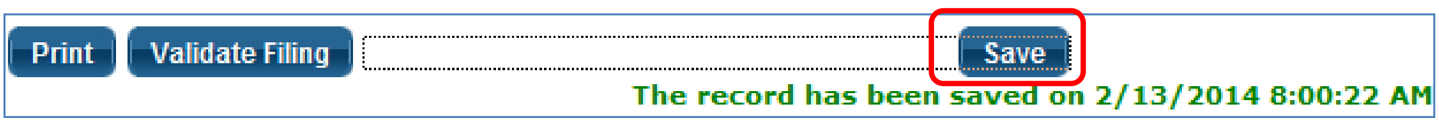
Uploading Documents

When a response requires you to attach a document, you may either do it on this page or on page 2. In this example, you could click the *(1) Documents* link.



Whichever way you choose, please see our instructions for attaching supplements.

That concludes the question-and-answer portion of the Annual Report. Now would be a good time to click the *Save* button to save your work.



Next up: Attaching your supplements (Page 2). We provide those instructions in a separate document.