

TAX FORMS INSTRUCTIONS FOR OUR SECURED WEBSITE FOR FILING PREMIUM, FRANCHISE AND FIRE MARSHAL TAX RETURNS

ALL TAX QUESTIONS MUST BE SUBMITTED BY EMAIL TO:
taxes@ins.state.oh.us.

Please do not call the Department of Insurance with tax questions.

CURRENT YEAR PREMIUM TAX FILINGS ARE 100% PAPERLESS

Current year tax returns must be filed electronically by their due dates with the Ohio Department of Insurance by selecting the “Secured Logon” option on our home page. You cannot create your own User ID and Password on our secured logon. Please see below.

To access the secured location on our website at www.ohioinsurance.gov, you must enter your company’s User ID and password. Check with your company treasurer if you do not have them. Email taxes@ins.state.oh.us for instructions if your treasurer does not have them. Remember to retain and secure your User ID and password for future entries into your secured logon. User ID’s are permanent and never change. You cannot create your own User ID and Password on our secured logon. **Please note:** User ID’s and passwords are company-specific. Even if you are part of a group, each company’s User ID and password are unique.

If you are a member of a group of insurers, as defined in Bulletin 98-2, be sure to read “Business Tax Credits” below before processing.

Processing instructions:

- Never use the **“Back”** or **“Forward”** buttons, as unsaved data will be lost.
- Whenever you complete a page, be sure to **“Save”** your data.
- **“Save”** data often. If you get the message, **“System currently unavailable. Please try later”** it means you have timed out and may have lost data. Log out and log back into the database. Saving a minimum of every ten minutes will avoid being timed out of the secured tax processing system.
- Select and process only the correct forms – refer to your ODI Checklist on our web page under Annual Filing Requirements.
- Refer to the “Navigation Links” box for instructions for specific forms and the tax form index.
- Click **“Next”** to continue entering your tax return information except for the last page of each form.
 - By clicking **“Next”** you activate edits. Error messages will appear at the top of your input screen in **RED**. If there are no edit errors you will automatically be taken to the next page.

- ****FINAL PAGE PROCESSING**** on each tax return.
 - A special box has been created to run edit checks on the final page. Before clicking the “Submit” button, click the “Check for Errors” button. Error messages will appear at the top of your input screen in **RED**.
 - Required documentation must be attached to your tax return electronically using the “Attachment” button on the last page of the return. Select the attachment button multiple times for multiple attachments. Do NOT submit state pages, Schedule T, or copies of the Ohio tax return. For foreign insurers, it is NOT necessary to attach a copy of your home state tax return unless it is needed to justify a specific deduction taken on the Ohio return. Most electronic format types are acceptable.

- **READY TO ELECTRONICALLY SUBMIT YOUR FORM!**
 - Enter your Tax Preparer information at the bottom of the page.
 - Select the “Attachments” button to attach required documents. If you have multiple documents, you must attach each document separately
 - Do not click the “Submit” button until you have completed the Business Tax Credit form, if applicable.
 - If you need to change anything use the Navigation Links located at the top of the return. **Do not use the “Back” button!**
 - **ONCE YOU SUBMIT AND YOUR FILING IS ACCEPTED, YOU CANNOT GO BACK AND CHANGE ANYTHING.**

- **HARDCOPY is no longer required. Ohio Premium Tax returns are now completely electronic with the exception of amended returns. For amended return information please send an email to taxes@ins.state.oh.us .**

Printing instructions for YOUR RECORDS ONLY. Hardcopy filing is no longer required.

- **When possible use legal paper stock and set printer margins (left & right) to minimum.**
- Once you have submitted electronically click the Tax Forms Index in the Navigation Links then click **Print Forms**.
- Once you click the “Print Forms” the system will automatically move you to the “Tax Forms Index”. If you have properly submitted your forms you will be able to print returns from here.
- On multiple page tax forms you will need to print each page separately. The system **will not** process and print all of the pages automatically. Page links for printing are at the bottom of the form after you submit.

If your tax return needs to be modified after you submit it, send an email to taxes@ins.state.oh.us for instructions.

Business Tax Credits must be allocated among members of groups of affiliated insurers (see instructions on Form INS7140 and bulletin 98-2) and entered online on form INS7140 before each member of the group submits its tax return. Once a tax return for a member of a group has been submitted, Business Tax Credit to that company cannot be changed without an amended return. Form INS7140 for every member of a group must be identical. To determine how much credit to allocate by company, first calculate each company's tax liability before the business tax credit using the appropriate premium tax form (INS7142, 7144, 7146, 7143, 7147, etc.) online. Click the "**Save**" button and print each tax return for your convenience. Once you have agreed on the allocation by company, go back and complete identical Forms INS7140 for each company online showing the allocations by company. You can access the Business Tax Credit directly from your forms index. From the Business Tax Credit line of your primary form, click Change Allocation . Enter data for all companies in your group and click "**Save**". The "**Save**" button will perform edit checks for balancing. If in balance, the system will automatically take you back to your primary tax form. Make certain that the correct Business Tax Credit was pulled forward. **NOTE:** Per Ohio Revised Code section 5729.031 the system will only allow Business Tax Credit up to the amount of premium tax calculated on the Ohio Basis. Retaliatory taxes are not eligible. On your primary tax form, click "Save Draft" and continue to process your primary tax form. See steps above.

NOTE: - In order to use this application, you will need Internet Explorer 5.0 and above, or Netscape 7.0 and above.

QUESTIONS – Send an email to: taxes@ins.state.oh.us . This email address is monitored by several staff members year-round. Do not call the Department for tax return questions. Emails will be responded to promptly.