The Menu Options

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

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. 2014

Note: To amend data input previously submitted on the Annual Report form access the following link to Amend a Submitted Filing

Continue

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.

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.

You have three payment options:
- e-Check (deducts the amount from your bank account)
- credit card
- paper check
The Washington OIC Web Portal Menu Options

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

<table>
<thead>
<tr>
<th>Amount</th>
<th>$220.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Details</td>
<td>Business Account</td>
</tr>
<tr>
<td>Account Type</td>
<td>Checking Account</td>
</tr>
<tr>
<td>Bank Routing #</td>
<td></td>
</tr>
<tr>
<td>Account #</td>
<td></td>
</tr>
<tr>
<td>Re-enter Account #</td>
<td></td>
</tr>
<tr>
<td>Name on the Account</td>
<td></td>
</tr>
<tr>
<td>Email Receipt To</td>
<td></td>
</tr>
</tbody>
</table>

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

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

![Payment Details](image)

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.

![Please wait.](image)

After processing, the screen will confirm payment.

![Confirmation](image)

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.
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:

<table>
<thead>
<tr>
<th>Type</th>
<th>Amount</th>
<th>Paid On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filing Fee-2014</td>
<td>$20.00</td>
<td>01/08/2015</td>
</tr>
<tr>
<td>Renewal Fee for 07/01/2015-06/30/2016</td>
<td>$200.00</td>
<td>01/08/2015</td>
</tr>
<tr>
<td>Premium Tax Q4-2013</td>
<td>$220.00</td>
<td>03/03/2014</td>
</tr>
<tr>
<td>Premium Tax Q4-2012</td>
<td>$220.00</td>
<td>03/04/2013</td>
</tr>
<tr>
<td>Premium Tax Q4-2011</td>
<td>$220.00</td>
<td>03/01/2012</td>
</tr>
<tr>
<td>Premium Tax Q4-2010</td>
<td>$220.00</td>
<td>05/11/2011</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Date Entered</th>
<th>Filing for Year</th>
<th>Name</th>
<th>Description for Amendment</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/19/2014</td>
<td>2013</td>
<td>ANNUAL REPORT</td>
<td>AMENDED FILING # 1</td>
</tr>
<tr>
<td>12/18/2014</td>
<td>2013</td>
<td>IRS FORM 990</td>
<td>WE RECEIVED A FILING EXTENSION FROM THE IRS.</td>
</tr>
<tr>
<td>12/18/2014</td>
<td>2013</td>
<td>AUDITED FINANCIAL STATEMENT</td>
<td>OUR AUDITOR NEEDED MORE TIME TO PREPARE THESE.</td>
</tr>
<tr>
<td>12/18/2014</td>
<td>2013</td>
<td>BANK/BROKERAGE STATEMENT - SEPARATE RESERVE FUND (SRF)</td>
<td>THIS VERSION HAS THE PAGES TURNED THE CORRECT WAY.</td>
</tr>
<tr>
<td>12/18/2014</td>
<td>2013</td>
<td>WA CGA CONTRACTS OUTSTANDING (SAC)</td>
<td>INCLUDES ALL WASHINGTON RESIDENTS.</td>
</tr>
<tr>
<td>12/18/2014</td>
<td>2013</td>
<td>ANNUAL REPORT ATTESTATION</td>
<td>THIS DOCUMENT HAS A BETTER SCAN THAN PREVIOUSLY.</td>
</tr>
<tr>
<td>12/18/2014</td>
<td>2013</td>
<td>ACTUARIAL CERTIFICATION</td>
<td>JUST BECAME AVAILABLE TODAY.</td>
</tr>
<tr>
<td>12/18/2014</td>
<td>2013</td>
<td>ANNUAL REPORT</td>
<td></td>
</tr>
</tbody>
</table>
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).

<table>
<thead>
<tr>
<th>Select Filing Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the year of the submitted filing you want to amend.</td>
</tr>
<tr>
<td>Continue</td>
</tr>
</tbody>
</table>

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

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

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

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

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

Dear Declan MacManus,

(WAOIC®) has added you as a Secondary User for the Washington State Filing and Payment Center.

To access the online system:

- Go to http://simboxonlineintg/login.aspx?module=FIN
- To login, use the following User ID and temporary password (Note: password is case sensitive):

  User ID:  FIN2
  Temporary Password: 4pg2RmE4

Once you login, you will be required to change your password. All passwords are securely stored and are only available to you.

If you have questions, please contact your company’s primary Financial Statement Contact, Robert Enzal at 000-555-0000 or [email protected]

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 own password.
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.