

Annual Reconciliation User Guide

(City Login) User Documentation



Kentucky Department of Insurance
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User Documentation
Version 3.0

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SETTING UP A NEW ACCOUNT

If you are a city representative wishing to view your city specific LGPT data, you will need to set this account up manually. To do so either:

- Submit an e-mail to the following e-mail address:

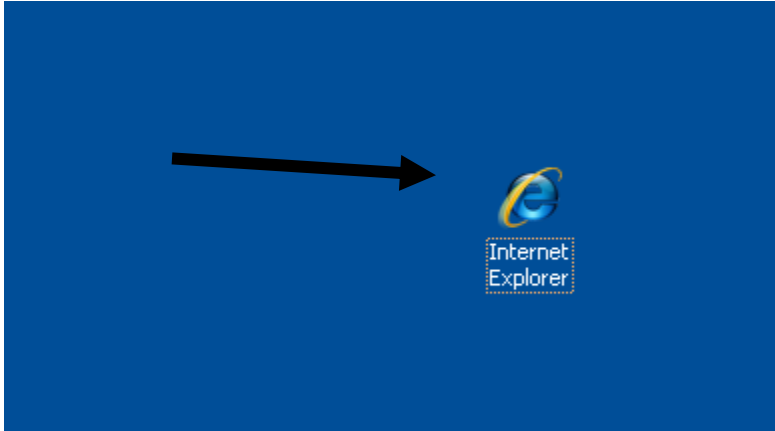
DOI.ISHelpDesk@ky.gov

- Or, you may call the DOI regarding this topic at 502-564-6154 X4359.

LOGGING INTO E-SERVICES

After acquiring your username and password from the DOI, follow these steps to log into E-Services.

Double click on the **Explorer icon** on your desktop. The icon is shown below.



Proceed to the Kentucky DOI webpage at:

<https://insurance.ky.gov/kentucky/>

The following page should appear.

The screenshot shows the homepage of the Kentucky Department of Insurance. At the top, there is a navigation bar with "Kentucky.gov", "KY Agencies | KY Services | Search", a dropdown menu for "Kentucky.gov", and a search box with "for Search Terms" and a "Go" button. Below the navigation bar is a header section with the text "Kentucky Department of Insurance" on the left, a central image of the state capitol building and horses, and the "eServices" logo on the right with a small icon and the text "denotes external link".

The main content area is divided into three columns. The left column contains a vertical menu with the following items: Home, Our Divisions / Programs, File a Complaint, Report Insurance Fraud, Consumer Information, Agent Licensing Information, Company Information, Communications and Public Outreach, Forms & Documents, Statutes & Regulations, Bulletins & Advisories, Publications, and Contact Us / Directions. The middle column features the "Department of Insurance" heading, a paragraph describing the department's role, a "Our Mission" statement, contact information, and a "What's New / Recent Topics" section with four bullet points. The right column has an "IMPORTANT!!" banner, a "Search Options" section, and a list of search filters: Agent / Agency, Insurer / Company, CE Provider, Courses and failure to comply with CE, Complaint Ratio, Market Conduct Examination Reports and Orders, Medicare Supplement, Statutes & Regulations, Legal Orders, and Forms & Documents.

Click the E-Services icon in the top right corner of the webpage.

This image is a close-up of the top right corner of the website, focusing on the "eServices" logo. A black arrow points directly to the "eServices" text. Below the logo, there is a small icon of a hand pointing to the right and the text "denotes external link". The background of this section shows a blurred view of the state capitol building and horses.

Which will direct you to the DOI e-services portal, as shown below.

Please log in here:

Username

Password

First time here? Please click here to register for secure access.

Forgot your password?

Having trouble logging in? Click here for assistance.



[Click Here](#) to learn about our security.

What does eServices offer?

Consumers

- Submit Consumer Complaint File
- View data related to ratios (i.e., Complaint, Medicare Supplement, Consumer Guides) - **
- Find information related to a licensed Insurer, Individual or Business Entity - **

New Applicants - ** (Paperwork not submitted yet)

- Access to applications, study guides, instructions and documents

Individuals (Licensed or pending applicants)

- Review your licensing information and account profile

Business Entities

- Review your affiliated individuals licensing information (i.e., addresses, examinations, license/application status, continuing education, etc.)
- Submit requests for additional licenses, clearance / certification letters, voluntary surrenders, address changes, name changes, license renewals, and designations. **

Insurers

- Review your affiliated individuals licensing information (i.e., addresses, examinations, license/application status, continuing education, etc.)
- Renew appointments and submit payments **(Instructions) - New**
- Submit financial responsibility requests. **

KY Department of Insurance

Enter the username and password here...

Please log in here:

Username

Password

[First time here? Please click here to register for secure access.](#)

[Forgot your password?](#)

[Having trouble](#)

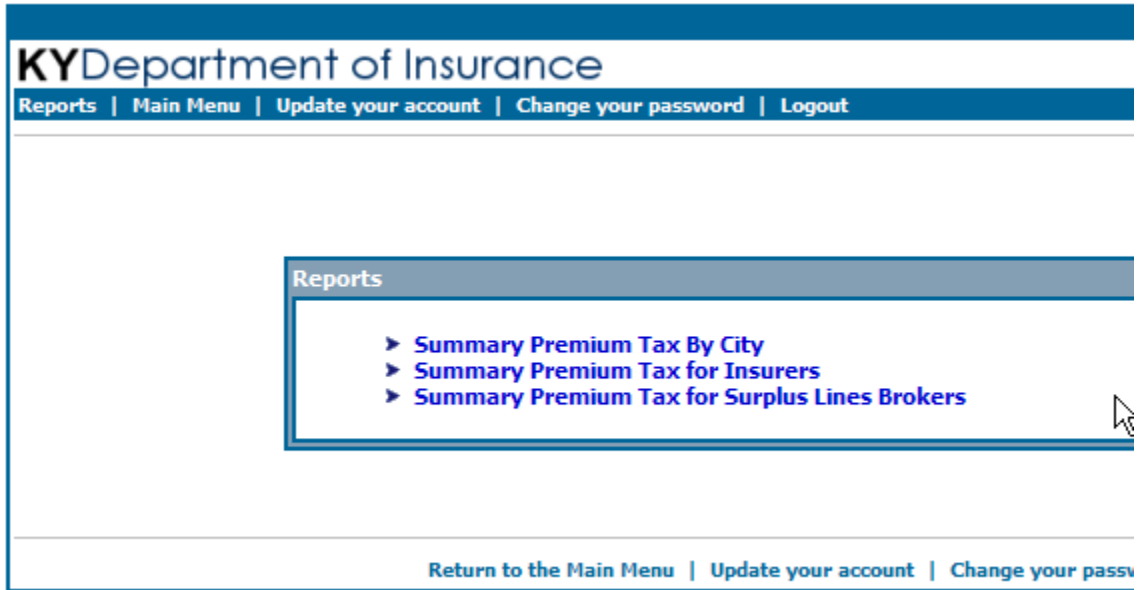
Please log in here:

Username

Password

Then click "Submit"

The following screen should display...



ACCESSING ANNUAL RECONCILIATION DATA FROM E-SERVICES

This account is set up for city/county taxing governments to see their data online via E-Services.

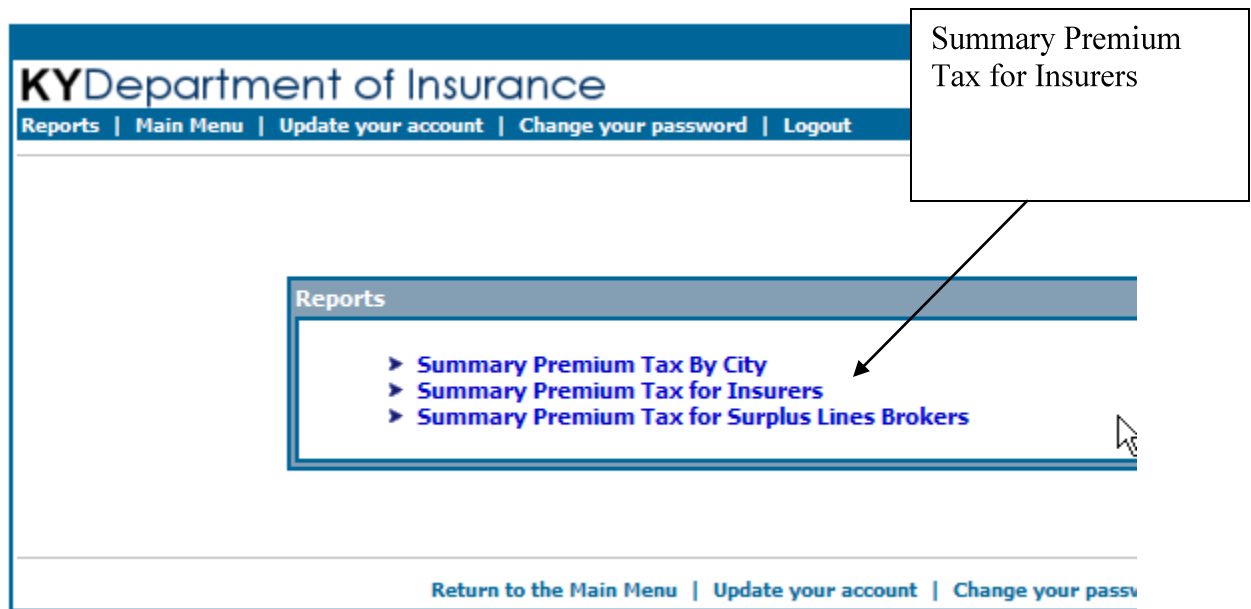
It is important to note the user will have access to only the specific city data for whom the account was set up.

After acquiring the login from the DOI, you may access the data by choosing:

Summary Premium Tax for Insurers

The Summary Premium Tax for Insurers Report will list all Companies that have written business in your city, along with Premium Amounts, Taxing Amounts, and any interest paid. This report is sorted by year, and is exportable via Excel.

To access this report, click:



Select the year you wish to review, then click “Submit”...


Annual Reconciliation Report

Tax Year

The data will display..

KY Department of Insurance
 Reports | Main Menu | Update your account | Change your password | Logout

Summary Premium Tax for Insurers

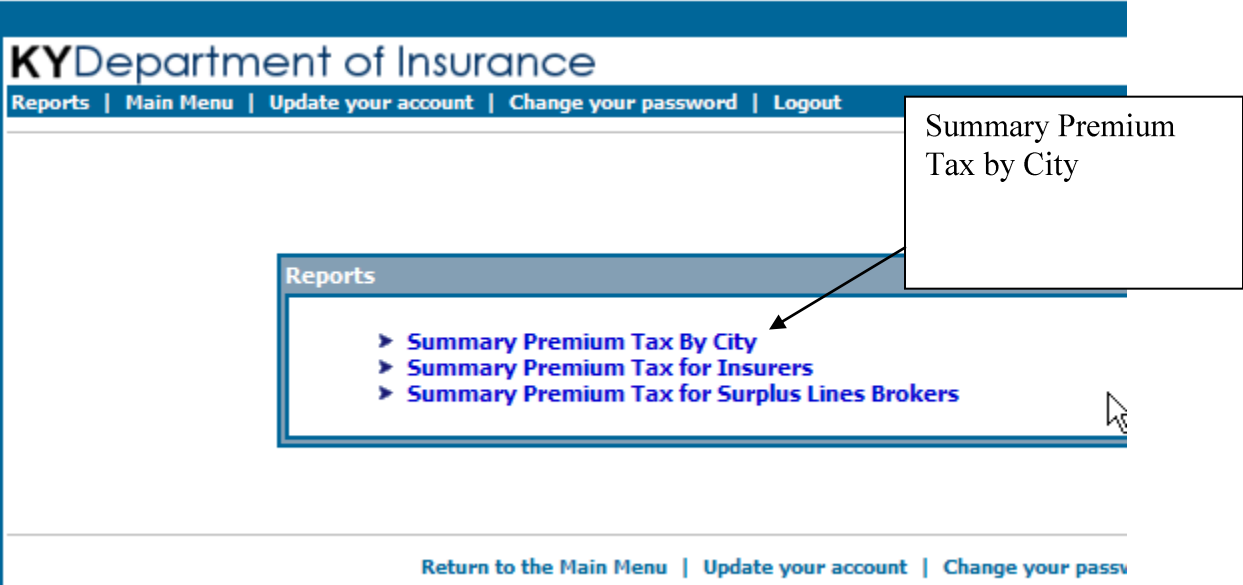
Tax Year 

Note: You may download the data to an Excel spreadsheet by clicking this icon

City Name	Tax Year :2008			
Insurer	FEIN/DOIID	Recorded Premium	Recorded Taxes	Annual Interest
AAA Life Insurance Company	52-0891929	\$15,262.00	\$305.00	
ACA Insurance Company	91-1874022	\$192.00	\$5.00	
ACE American Insurance Company	95-2371728	\$1,059,639.28	\$30,351.13	
ACE Fire Underwriters Insurance Company	06-6032187	\$137,172.48	\$9,600.41	
ACE Property and Casualty Insurance Company	06-0237820	\$7,729.70	\$165.51	
ACUITY, A Mutual Insurance Company	39-0491540	\$333,314.29	\$15,737.00	
AETNA Insurance Company of Connecticut	06-1286276	\$1,389.00	\$28.00	
AF&L Insurance Company	23-2401229	\$19,310.30	\$386.21	
AIG Indemnity Insurance Company	13-1967524	\$4,422.00	\$90.00	
AIG Life Insurance Company	25-1118523	\$1,826.77	\$44.35	
AIG National Insurance Company	13-3801089	\$53,962.00	\$1,080.00	
AIG Premier Insurance Company	22-1721971	\$153.00	\$5.00	
AXA Insurance Company	13-3594502	\$1,282.00	\$90.00	

Summary Premium Tax By City

This report will compare previous annual data concerning the taxing entity.



The screenshot shows the KY Department of Insurance website interface. At the top, there is a blue header with the text "KY Department of Insurance" and a navigation bar with links: "Reports | Main Menu | Update your account | Change your password | Logout". Below this, a "Reports" menu is displayed with three items: "Summary Premium Tax By City", "Summary Premium Tax for Insurers", and "Summary Premium Tax for Surplus Lines Brokers". A callout box with the text "Summary Premium Tax by City" and an arrow points to the first item in the menu. At the bottom of the page, there are additional navigation links: "Return to the Main Menu | Update your account | Change your passv".

Click "Summary Premium Tax by City"....the results display..

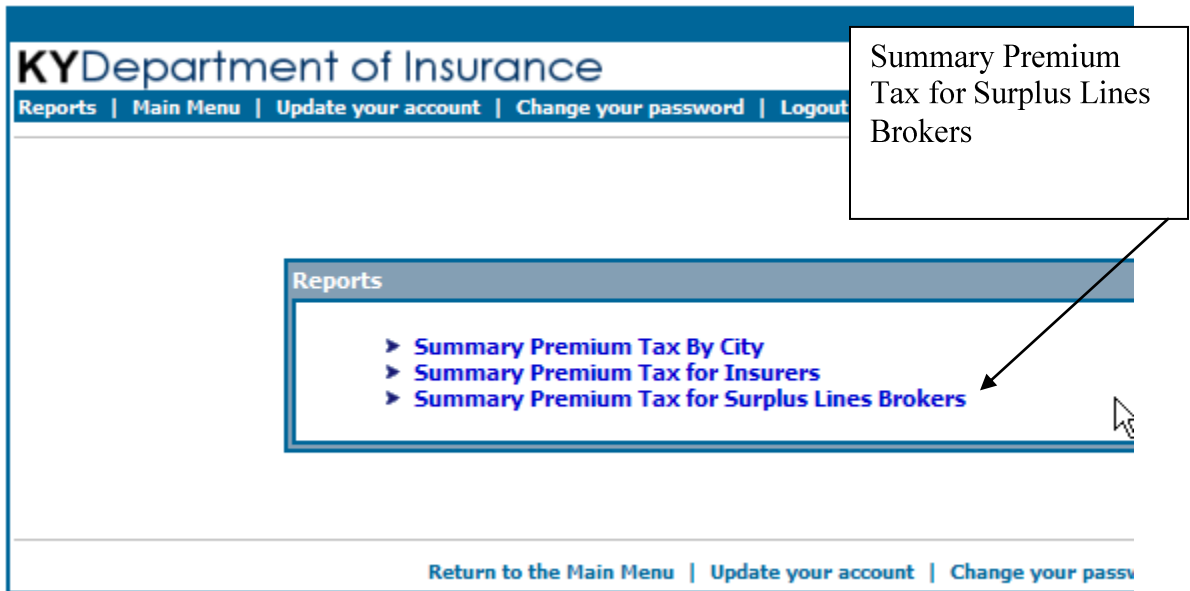
Summary Premium Tax by City

City Name	Bowling Green	
Year	Annual Premium	Annual Tax Paid
2005	\$91,556,934.08	\$2,947,636.27
2006	\$99,292,003.73	\$3,058,077.01
2007	\$96,686,157.34	\$4,403,135.00

Summary Premium Tax for Brokers

The Summary Premium Tax for Surplus Lines Brokers Report will list all Brokers that have written business in your city, along with Premium Amounts, Taxing Amounts, and any interest paid. This report is sorted by year, and is exportable via Excel.

To access this report, click:




Select the year you wish to review, then click “Submit”...

The screenshot shows a form titled "Annual Reconciliation Report". Below the title, there is a "Tax Year" label followed by a dropdown menu showing "2006" and a "Submit" button. A black arrow points from the right side of the form to the "Submit" button.

The data will display..

KY Department of Insurance
Reports | Main Menu | Update your account | Change your password | Log out

Summary Premium Tax for Surplus Lines Brokers

Tax Year: 

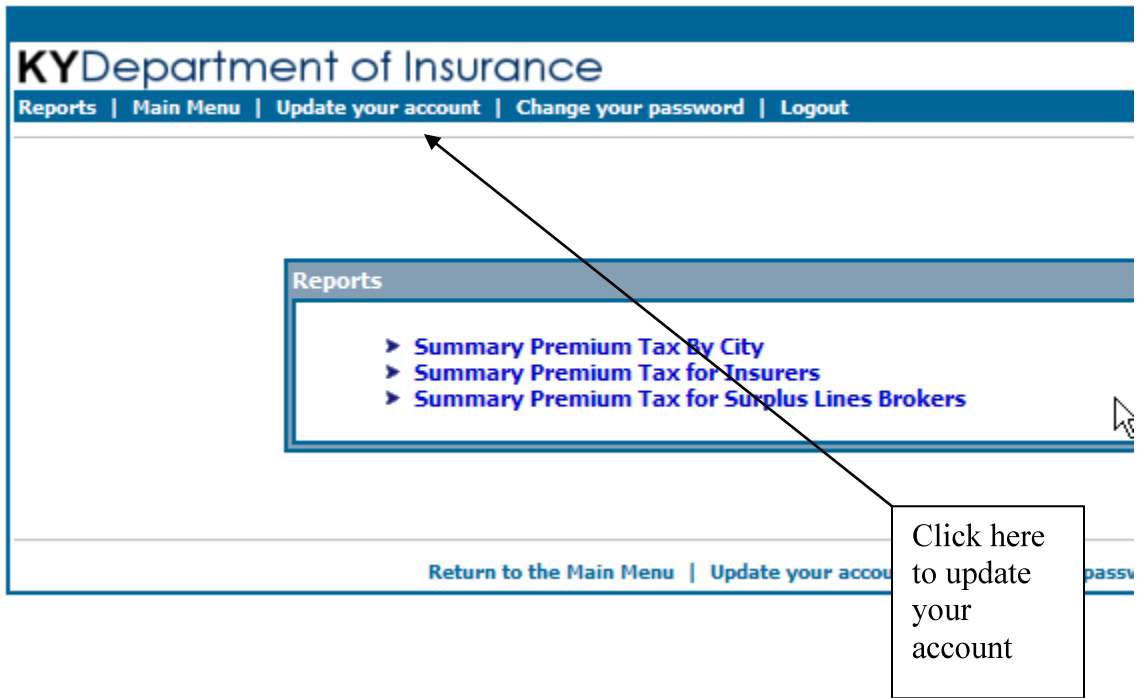
Note: You may download the data to an Excel spreadsheet by clicking this icon

City Name :Bowling Green	Tax Year :2006	
Name	Recorded Premium	Recorded Taxes
Alexander Clark Cameron	\$8,325.00	\$300.96
Alison Joy Renner	\$-382.00	\$-7.64
Bruce Wayne Ferguson	\$6,136.57	\$429.56
Charles Minor Moore	\$5,561.00	\$111.22
Christiaan Lance Volkert	\$148,578.00	\$3,200.61
Christopher Bernard McGovern	\$31,322.63	\$655.10
Davis Donald Moore	\$8,600.00	\$172.00
Don Chris Keen	\$3,000.00	\$60.00
Donald A Alberico	\$35.65	\$2.50

ACCOUNT MAINTENANCE

There are tools in the account that allow you to update your information, or change your password.

Updating Your Account



Update Account Information

Update Account Information - updates eServices account information only.

Updating your address on this profile does not update your official record with the department. You must complete "Record Correction Form 8303" on the eServices menu.

User Name: Annrec2009
 Password: ***** (To change your password, [Click here](#))

First Name:
 Middle Name:
 Suffix Name:
 Last Name: (DO NOT ADD SUFFIX: JR, SR, etc)
 Phone: Extn (Numbers Only)
 Email:
(include the .com, .net or .org - accounts with invalid e-mail addresses will be removed)

Address Line1:
 Address Line2:
 City:
 State: Zip:
 Security Question:
 Answer:

Make any changes to the data here...

Then click 'Update Account' here to finalize the changes.

Changing Your Password

Click here, to change your password.

