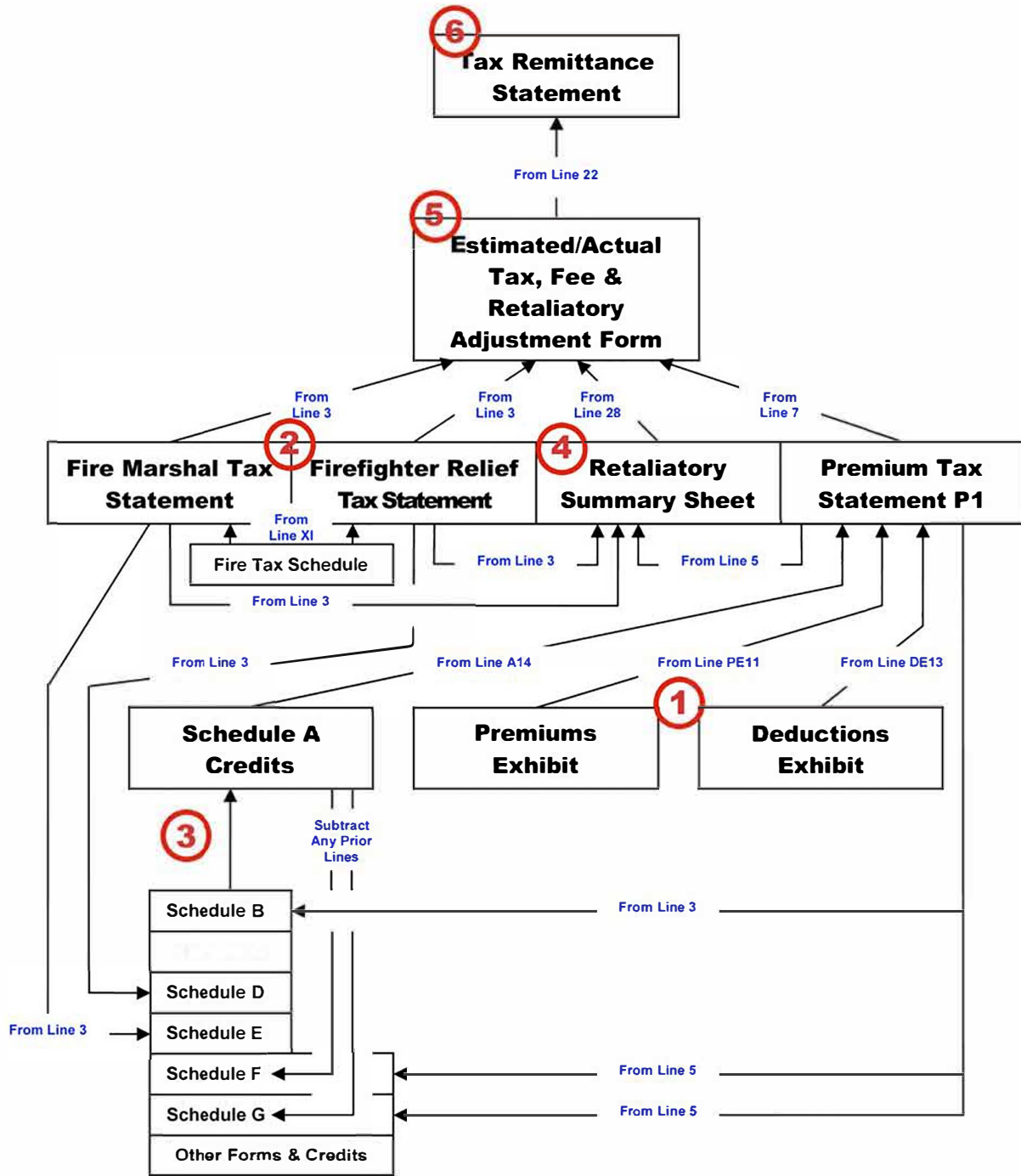


Kansas Insurance Tax Form Workflow



Not all forms shown above are applicable to all companies. Companies complete only the forms required of them based on their company type and whether they are a Kansas domestic company. See instructions that pertain to your company type for more information. See also the following page which provides a suggested workflow through the forms.

When using the Kansas online tax form wizard, the user will be guided through the forms following the above workflow. Or the user can access schedules and forms at will from the Tax Form Home. Either way, data may be entered into forms as it is available; appropriate calculations will be made and available data will be moved forward from form to form automatically. Still, certain forms contain key data and must be entered for other forms to begin to contain meaningful totals. These key forms include the Premiums and Deductions Exhibits, and for property and casualty companies, the Fire Marshal and Firefighters Relief Tax schedule and statement. It is beneficial to complete these forms first.

Steps to Complete Kansas Insurance Tax Forms

1. Complete Premiums & Deductions Exhibits. Results will automatically populate Lines 1 through 3 of Annual Premium Tax Statement Page 1; base tax will be calculated at a rate dependent on company type, populating Line 5.
2. Property & casualty companies complete Fire Marshal & Fire Fighters Relief Tax schedule. Schedule data will automatically populate these statements.
3. With numbers from Annual Premium Tax Statement Page 1 automatically flowing to Schedules B, F and G, and numbers from Fire Marshal & Fire-fighters Relief Tax Statements flowing to Schedules D & E, complete Schedule A and its related schedules & forms. Note: the amounts on all prior lines of Schedule A will be automatically subtracted where appropriate on Schedules F and G. Total Schedule A credits will be subtracted from Annual Premium Tax Statement Page 1.
4. Non-domestic companies, numbers from Annual Premium Tax Statement Page 1, Fire Marshal & Firefighters Relief Tax Statements, and other fees charged or paid as shown in Kansas Insurance Department records will be automatically populated to the Retaliatory Summary Sheet. Complete the sheet for any other fees and home state calculations.
5. All relevant information from above will be automatically populated to Estimated/Actual Tax, Fee and Retaliatory Adjustment Form; pre-payments made in June and December will be pre-populated from Kansas Insurance Department records.
6. Information will be automatically populated to the Tax Remittance Statement.

If a refund is owed, complete the banking information for ACH payment. Amounts over \$50,000 are required to be sent via ACH.

Complete the remaining information for the contact person submitting the form, account receivable contact and company officers.

Upload any required documentation using the link "Attach Word, Excel, PDF and other Image Files".

Check all boxes that apply for items j. through u. Click "Calculate and Save Page" to save your work.

If a payment is due, select echeck or credit card using the drop down. Check the Submission Checkbox and follow the remaining prompts to complete submission of the return.

At Tax Form Home use "View/Save/Print your Annual Tax Form Packet PDF File" to retain a copy of the tax return filing.