



**DEPARTMENT OF INSURANCE
STATE OF ARIZONA**

Financial Affairs Division – Tax Unit
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INSTRUCTIONS FOR COMPLETING FILLABLE FORMS ON-LINE

Most of our tax forms and related schedules, as well as some forms related to the Annual Statement filing can now be completed on line in a fillable form. Some of the forms contain fields that will do the calculations for you. Most forms are set up to advance from left to right by rows however, some forms with multiple pages may advance from top to bottom within columns. Before entering any data, you can test the sequencing pattern by pressing the TAB key and watching where the cursor goes.

To start, open the form and press the TAB key. After entering your data, press the TAB key to navigate through the form until all data is complete. To go back to a previous field, hold the SHIFT key down while you press the TAB key. There are GOTO buttons throughout the Annual Tax forms that take you to specific pages and fields to complete the required data in sequential order. **You must TAB through the form so that formatted numerical fields automatically calculate.** If you make a mistake, and click into the field, once you have corrected the data, TAB to the end of that page to update calculations.

Reset Button:

There is a reset button located at the top of most forms; press that button to erase **ALL** the fields on the form.

Unformatted Text Fields are:

- NAIC #
- Federal ID #
- Dates (you may enter date as Jan 1, 2005 or 01/01/05)
- Company Name
- Address lines
- Group #
- Preparer

Formatted Text Fields are:

Phone # or Fax number: Enter digits **without** slash marks, hyphens or parenthesis.

Formatted Numeric Fields:

In all numeric fields, enter **the entire figure, including the decimal point and cents.** When a form calls for percentages, you may enter the actual percentage, for example, for **2%** you may enter **.02** or just **2**.

Calculated Numeric Fields:

These fields will **automatically calculate** an amount based upon other related entries. They will contain **"0.00"**. You will not be able to enter data in these fields.

Check Boxes: (where you would normally write an "X" or check mark "√")

To have an "X" or "√" marked in a check box, use your mouse and click on the box.

To remove an "X" or "√" from the check box, click on the box again.

Option Boxes: (where you must choose on option among two or more options)

With option boxes one of the options will always be selected. To change the option that is selected, use your mouse and click on the correct option.

For assistance call

Annual Tax forms and related schedules: (602) 364-3997

Annual Statement forms: (602) 364-3245

Installment Tax or Industrial Insured Tax forms: (602) 364-3246