OHCig

# OHCig Certification Portal User Guide

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# OHCig Certification Portal User Guide

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# OHCig Certification Portal User Guide

## 1 General Information

### 1.1 Introducing the OHCig Certification Portal

The Ohio Attorney General's Office is pleased to introduce a special online application, the OHCig Certification Portal. All tobacco product manufacturers (companies that manufacture cigarettes and roll-your-own (RYO) tobacco), must use the OHCig Portal to complete and submit the various certifications required to list or maintain brands on the Ohio Tobacco Directory. This User Guide explains how to access the application, manage user accounts, submit certifications, maintain certain data, and get help with using the application.

### 1.2 Background and purpose

Cigarette and RYO tobacco brand families must be listed on the Ohio Tobacco Directory to be legally sold in Ohio. To determine eligibility for listing, the responsible company must certify compliance with state and federal requirements in addition to compliance with either payment obligations under the 1998 Tobacco Master Settlement Agreement (MSA) or compliance with Ohio's tobacco escrow statute and related rules.

Within the Attorney General's Office, the Tobacco Enforcement Unit is primarily responsible for maintaining the online Ohio Tobacco Directory. To do this, the unit manages the certification process and generally verifies a company's compliance with its obligations under the MSA and various state and federal tobacco laws.

The OHCig Portal aims to simplify and better organize the process of certification and the reporting of data required to verify ongoing compliance with relevant laws and regulations.

The third release of the OHCig Portal adds various functions and enhancements to the system, so companies can now:

- File initial certifications.
- Report escrow withdrawals.
- Update packaging at any time.
- View historical information about the company's certification and brand activities.

Plus, other enhancements allow users some customization of their individual accounts.

### 1.3 Requesting technical and business support

The Attorney General's Office is committed to continuously improving the OHCig Portal. As part of that commitment, the office invites feedback from all portal users. Please provide feedback using these email addresses:

- For technical issues (such as a failed login, inability to attach a document, etc.): ITSSupport@OhioAGO.gov.
- For all content-related issues and any general comments or suggestions about the portal: TobaccoEnforcement@OhioAGO.gov.

# 2 Logging In and Creating Accounts

## 2.1 How to log in to OHCig and create user accounts

From any web browser, visit https://tobaccocert.ohioattorneygeneral.gov/ to log in or create a new user account from the Welcome page of the portal (shown below).

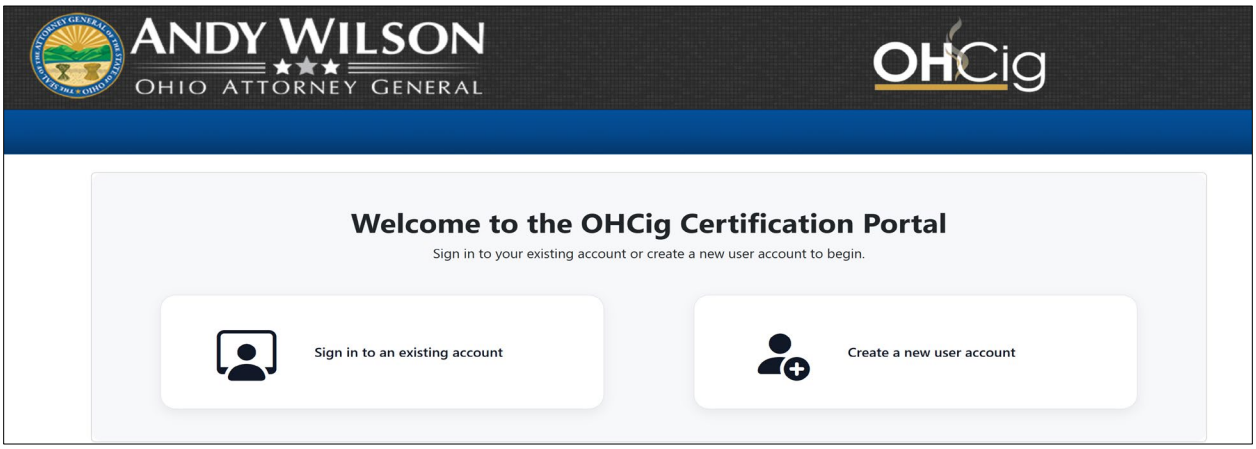



*Figure 1: OHCig Welcome page*

### 2.1.1 Registered users

Users who already have an account should start by clicking on "Sign in to an existing account" and providing the appropriate account credentials. Once signed in, the user lands on the company dashboard.

### 2.1.2 New users

New users start by clicking on "Create a new user account" and following the instructions to establish a new user account. A new user must:

1. Provide an email address that will be associated with the account (see important note below).
2. Then verify that the email belongs to the user (see Figure 2).

Once the email has been verified, the remaining information must be completed to establish the account.

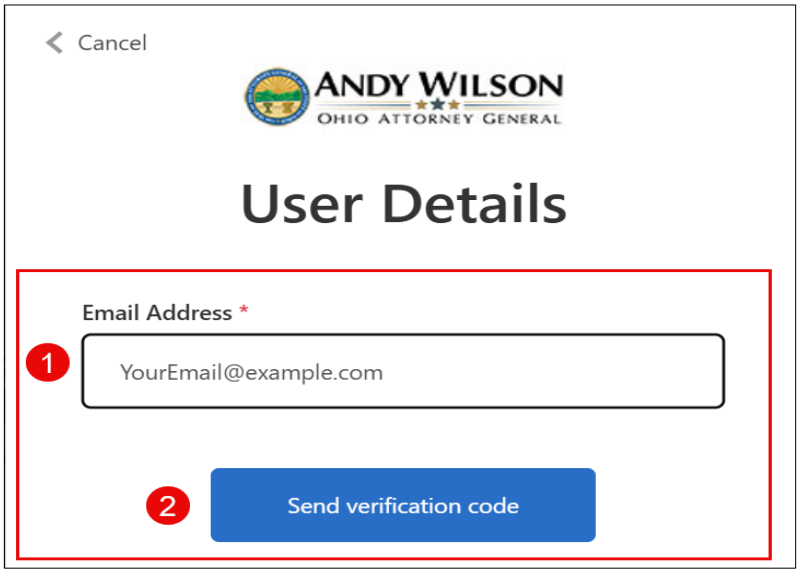



*Figure 2: New user email verification*

*Important note*: **Each user account is specific to an individual and can be linked to only one company at a time.** So, if a person wants to access OHCig on behalf of multiple companies or wants to have multiple roles for the same company, the person must create a separate user account **with a different email address** for each company and user role.

**Caution: Shared Emails**

It is NOT recommended to use shared or group emails when creating a user account because, once used, that email cannot be reused later for a new user. Future OHCig updates will allow a shared email to be used for notification purposes.

## 2.2 Creating and linking to company accounts

To do any work in the OHCig Portal, each user must be linked to a company account. Once linked, a user will automatically be taken to the company dashboard upon logging in. When first logging in, new users must either select an active company to link to, or request reactivation or creation of a company account.

### 2.2.1 Linking to an active company

After signing in, a new user (and any user that has been removed from a company account) will need to request access to the appropriate company account by selecting the company from the dropdown list of active companies. A notification will then be sent to the company's Admin User(s), who must accept the request and assign a user role to the new user. (See below for more on user roles.)

The Attorney General's Office does not grant or deny user access to any company account. It is the responsibility of each company to manage which users have access to its OHCig account. Therefore, any questions about access to an active company's account should be directed to the company.

### 2.2.2 Reactivating an inactive company

If a user's company does not appear in the list of active companies, click the "Check inactive companies" button to see if the company previously had an active OHCig account or had been listed on the Ohio Tobacco Directory. If the user's company appears on this list, the user can select and submit that name to request reactivation of the company account. A notification will then be sent to the Tobacco Enforcement Unit to review the request. The requesting user will receive an email notification of the decision. If the request is approved, the user will be linked to the company as the Admin User. If the request is rejected, the user will again see the company selection option when next logging in.

### 2.2.3 Creating a company

If a user's company does not appear in either the lists of active or inactive companies, the user can request that a company account be created by clicking the "Company not shown" button. The user must then provide the requested details about the company and submit the request. A notification will be sent to the Tobacco Enforcement Unit to review the request. The requesting user will receive an email notification of the decision. If the request is approved, the user will then be linked to the company as the Admin User. If the request is rejected, the user will again see the company selection option when next logging in.

## 2.3 Logging out of OHCig

Once logged in, a user can log out of the portal by clicking on the user's name in the upper-right corner of the company dashboard and using the "Sign out" option. A user will automatically be logged out of the system after 30 minutes of inactivity.

## 2.4 User roles

Each user account can have only one assigned role for a company, but a company can have many users and multiple users can be assigned to each role. To cover all OHCig Portal functions, a company must have a minimum of two user accounts: an Admin User and a Signature Authority User.

### 2.4.1 Admin User

The Admin User manages user accounts for the company. This role includes approving requests from a user to access the company account, assigning or changing user roles for the company, and removing users from the company account. In addition, the Admin User – like a Data Entry User – can enter and modify company data and upload materials into OHCig.

A company must always have at least one Admin User but may have more. Therefore, to change Admin Users when a company has only one, a new Admin User must be assigned *before* the existing Admin User can be changed.

### 2.4.2 Signature Authority User

The Signature Authority User approves and signs certifications and officially submits them on behalf of the company to the Attorney General's Office. In addition, the Signature Authority User – like a Data Entry User – can enter and modify company data and upload materials into OHCig. If a certification has been prepared by another user, the Signature Authority User can request edits to the certification before signing and submitting it.

A company must have a Signature Authority User to submit certifications. To become a Signature Authority User, a user must have created an account, been assigned to the role by an Admin User, *and* must provide a completed Signature Authority User Affidavit to the Tobacco Enforcement Unit. The Tobacco Enforcement Unit must then approve the role assignment.

### 2.4.3 Data Entry User

The Data Entry User can enter and modify company data and upload materials into OHCig, allowing the user to maintain data on the company dashboard and prepare certifications for approval and submission by a Signature Authority user.

The Data Entry role is the default role for new users joining an existing company account in OHCig.

# 3 Company Dashboard

## 3.1 Dashboard overview

Once successfully logged in and linked to a company account, a user lands on the company home screen, referred to as the "Dashboard." From the Dashboard, the user can see summarized details about the company and the company's current system activities. A menu bar at the top of the page also provides access to various system functions. The Dashboard is organized into the following main areas:

- Company information
- Notifications and certification status
- Menus

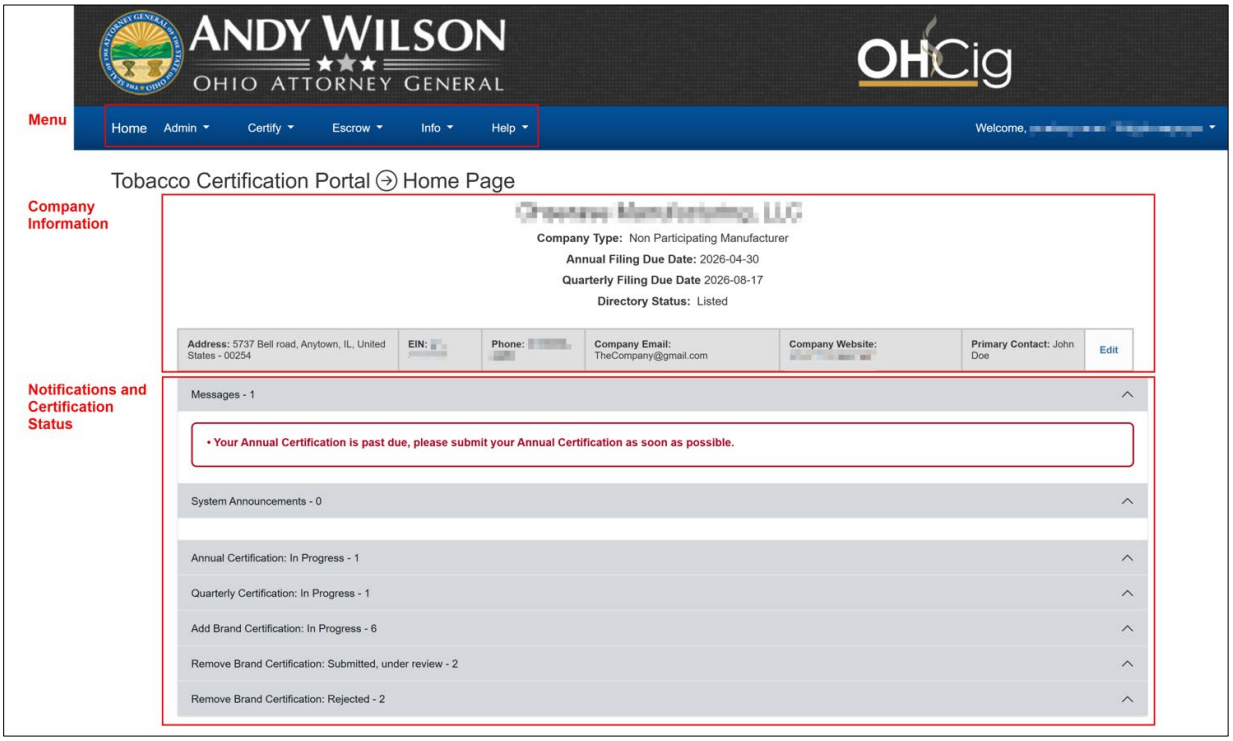



*Figure 3: Dashboard areas*

## 3.2 Company information

The company name, type, and directory status are managed by the system and the Attorney General's Tobacco Enforcement Unit. However, users may edit company contact details at any time (using the edit link to the right of the company details) and are encouraged to ensure that these details are reviewed frequently for accuracy.

## 3.3 Notifications and certification status

### 3.3.1 Messages and system announcements

The Messages section of the Dashboard provides automated reminders and system-generated alerts for the convenience of users. These messages include reminders about approaching deadlines and alerts regarding missing account information that is required.

The System Announcements section of the Dashboard displays important information of general interest posted from time to time by the Attorney General's Office. Users might see notices about periodic system maintenance, known system issues, changed deadlines, updated certification requirements, and other issues.

### 3.3.2 Requests for user access

This section, which shows only for Admin Users, is where requests appear from OHCig users who want to be linked to the company account. Admin Users must accept a request and assign a user role before the user can access the company account.

### 3.3.3 Certification status

Below the messages and announcements are various sections that show the company's certification activity. They are organized by type of certification and completion status. Each section contains details about the certification such as when it was started and the user who initiated the certification. Certifications that are not complete must be accessed from these sections to resume work.

## 3.4 Menus

In the upper part of the Dashboard is a menu bar that gives users access to the following system functions and features:

- **Home**: Returns user to the Home Page
- **Admin**: Shows the company's current of users and accesses the packaging update function
- **Certify**: Provides access to start each certification type relevant to the company
- **Escrow**: Allows for reporting of escrow deposits and withdrawals (non-participating manufacturers only)
- **Info**: Provides access to various reporting and information links
- **Help**: Contains a link to this User Guide and other help for using the OHCig Portal

### 3.4.1 Admin: Managing company users and brand packaging

The Admin menu provides access to the current list of company users and each user's role in the system. From this list, an Admin User can change the role of an existing user using the Edit function or delete a user from the company's account.

This menu also allows a company to upload packaging updates for its brands at any time. Each brand's packaging must be uploaded separately for the associated brand. Updates made here will be reflected in the next Annual Certification.

### 3.4.2 Certify: Filing certifications

The Certify menu shows all certification types relevant to the company. These links allow a company to begin each type of certification. (Certification types are described in a later section.)

The links for annual and quarterly certifications are available based on the filing periods and deadlines for submitting each type of certification. Only one annual or quarterly certification may be in progress at a time. Once started, the menu link is greyed out and users must access the certification from the appropriate certification section of the Dashboard.

Supplemental certification links (for both Add Brand and Remove Brand) are available at any time, and multiple supplemental certifications may be in progress at once. However, once started, a supplemental certification in progress must be accessed from the appropriate certification section of the Dashboard. Using a supplemental certification menu link always starts a new certification.

If you accidentally begin a new certification, just use the Cancel button on the certification's introduction screen to return to the Home page. If you no longer wish to complete a supplemental certification in progress, it can be terminated by using the Delete button next to that certification in the appropriate section of the Dashboard.

### 3.4.3 Escrow: Reporting escrow details

The Escrow menu, which is only available to NPM company users, allows an NPM to report deposits to and withdrawals from its qualified escrow fund. Reporting these transactions on OHCig satisfies an NPM's obligation to notify the Attorney General's Office of escrow deposits and withdrawals.

### 3.4.4 Info: Company-related information

The Info menu provides access to information about the company's brands and past certifications. This menu also provides links to the Ohio Tobacco Directory and Public Notice websites.

## 3.5 General user account features

The OHCig Portal automatically communicates to your company's users and the Attorney General's Tobacco Enforcement Unit after certain events have occurred in the portal. Here are examples of the events that currently prompt different types of email notifications:

**Account-related events**

- When an OHCig user requests access to a company's account, the requesting user and company Admin User both receive an email.
- When the Admin User has approved a request for access for a new user, the requesting user and company Admin User both receive an email.
- When the Admin User assigns the Signature Authority role to a user, the Tobacco Enforcement Unit receives an email requesting approval of the assignment.
- When the Tobacco Enforcement Unit approves or rejects an assignment of Signature Authority to a user, an email is sent to the Signature Authority User.

**Certification-related events**

- When a user requests approval of a certification by a Signature Authority User, all company users receive an email notice of the request.

- When a company user unlocks a certification for edits or a Signature Authority User requests edits, an email notification goes to all company users.
- When any type of certification is formally approved and submitted, company users and the Tobacco Enforcement Unit receive email notice of this action.

# 4 Certifications

## 4.1 About certifications

OHCig Portal's main purpose is to facilitate the filing of certifications by companies that are tobacco product manufacturers. These certifications allow the companies to maintain brands currently listed on the Ohio Tobacco Directory or to request to add, modify, and remove brands. The portal is designed to allow for the filing of four types of certifications: annual, quarterly, initial, and supplemental.

### 4.1.1 Annual certification

An annual certification is required of each company with brands currently listed on the Ohio Tobacco Directory. This certification requires confirmation of information about the company and all brands currently listed on the Directory. Companies may *not* add or remove brands using the annual certification; this must be done using a supplemental certification (described below).

### 4.1.2 Quarterly certification

A quarterly certification is required of all companies that are MSA non-participating manufacturers (NPMs) with brands currently listed on the Ohio Tobacco Directory. This certification, which is shorter than the annual certification, requires companies to report sales and escrow deposits on a quarterly basis.

### 4.1.3 Initial certification

An initial certification is required of a company with no brands listed on the Ohio Tobacco Directory. It is similar to an annual certification but requires additional information about the company and its history.

### 4.1.4 Supplemental certification – Add Brand

This type of supplemental certification is for companies that wish to add a brand to the Directory. It encompasses detailed information about the brand to be added and the brand's compliance history. Each certification can request the addition of only one brand.

### 4.1.5 Supplemental certification – Remove Brand

This type of supplemental certification is for companies currently listed on the Directory that wish to remove one or more of their listed brands from the Directory. This brief certification confirms the reason for the request. One certification can request the removal of multiple brands.

## 4.2 Completing a certification

To start a certification, go to the Certify menu on the company Dashboard and select the appropriate certification type. Each certification starts with an introductory page that confirms the type of certification and the company initiating the certification. Review the guidance on how to use the system, then select Continue to proceed with the certification or Cancel to abandon the certification and return to the Dashboard.

### 4.2.1 Starting a certification

When you start an annual, quarterly, or initial certification and proceed past the introduction screen, the system displays the Company Details page. You must review the company information before continuing. Any necessary updates can be made on this page. The list of Authorized Persons should include any individual authorized to communicate with the Attorney General's Tobacco Enforcement Unit regarding certification issues. One Authorized Person must be designated as the company's primary contact for certification purposes.

You must click the Save button to preserve any newly added or modified data and continue with the certification. Once you click Save on the Company Details screen, a navigation menu appears on the left side of the screen. The sections of the certification can then be completed in any order.

When you start a supplemental certification and proceed past the introduction screen, simply follow the instructions on the screen to complete the required information. In some cases, there will be a navigation menu on the left side of the screen that allows you to complete the certification's sections in any order.

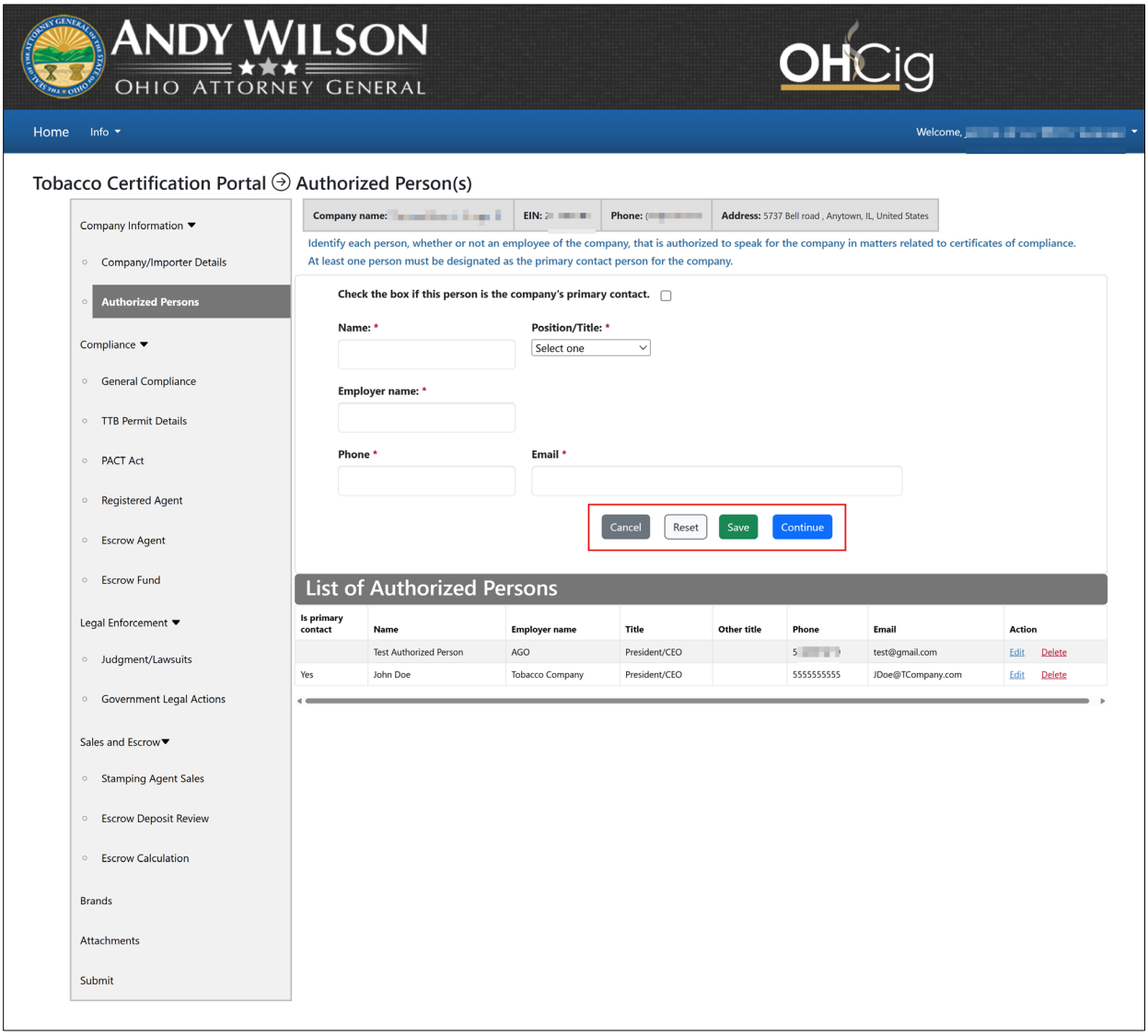



*Figure 4: Navigation buttons within a certification*

### 4.2.2 Navigating a certification

Each main certification section has a set of navigation buttons:

- **Cancel:** Exits the certification and returns the user to the Company Details page
- **Reset [on some pages]:** Undoes any data entry since arriving at the page and remains on the page; data fields and radio buttons revert to their previous settings
- **Save:** Stores any data entered on the page and remains on the page; enables any sub-pages for additional data entry
- **Continue:** Moves to the next page shown on the left navigation menu

As you proceed through the certification, each page includes required fields or questions marked with a red asterisk. If you try to save the input to a page without completing a required response, the system displays a warning and won't allow you to save any changes until all required fields are completed. **Remember to always use the Save button before navigating away from any screen**

**where you have entered or modified data.** The system will ask you to confirm leaving a page without saving changes.

### 4.2.3 Reviewing a certification

Once a certification has been completed, users are encouraged to review all information provided to ensure completeness and accuracy. At any time during the completion of a certification, a user can access the portal's built-in review functions from the Submit page of the certification:

- **Error Check:** Identifies any required fields with missing data
- **Attachments Check:** Identifies any required attachments that have not been provided
- **Certification Preview:** Displays what the final certification would look like with the data as currently provided; a list of current attachments will be shown but full attachments will not be displayed in the preview

A certification can be modified at any time before it is submitted. Once a certification is submitted, no additional modifications can be made in the system, so make sure all data and attachments are correct, current, and complete BEFORE submitting. (See below for instructions on what to do if changes need to be made after submission.)

## 4.3 Submitting a certification

Once a certification is complete, has been reviewed, and both Error Check and Attachments Check show nothing is missing, you can proceed to the submission process.

### 4.3.1 For Data Entry Users and Admin Users

Only users with Signature Authority can officially submit a certification in the system. (For more information, refer to Section 2.3 | User roles). If a Data Entry User or Admin User has completed the certification, the user must indicate that the certification is ready for submission by pressing the Request Approval button on the Submit page. Request Approval notifies all Signature Authority Users that the certification is ready for review and submission. Request Approval also disables the ability for Data Entry Users and Admin Users to edit the certification.

If, after approval has been requested, any user determines that modifications are required, the user can press the Unlock for Edits button to again allow the certification to be edited. Doing this notifies all users that the certification is no longer ready for review and submission.

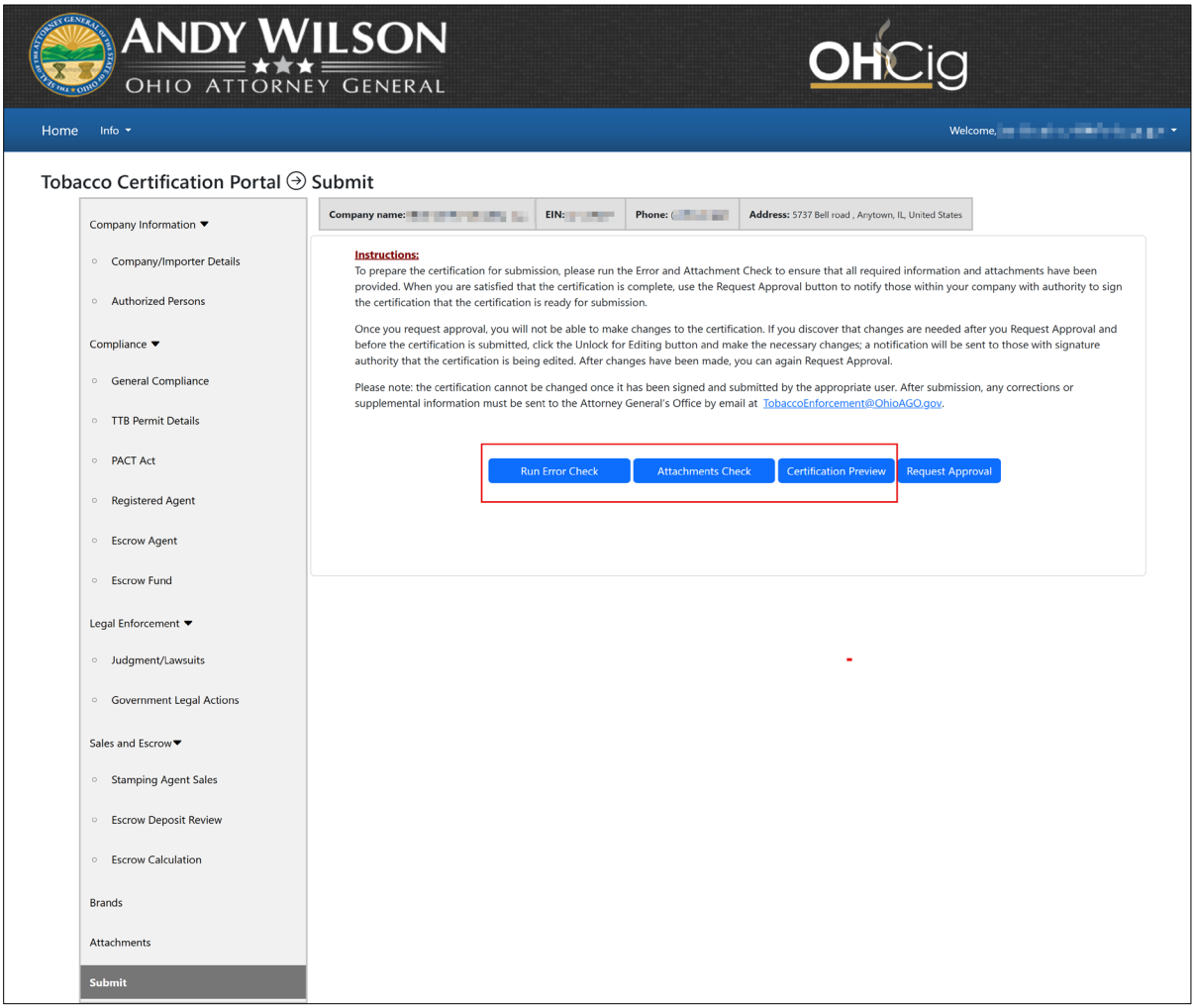



*Figure 5: Submit screen for Admin Users and Data Entry Users*

### 4.3.2 For Signature Authority Users

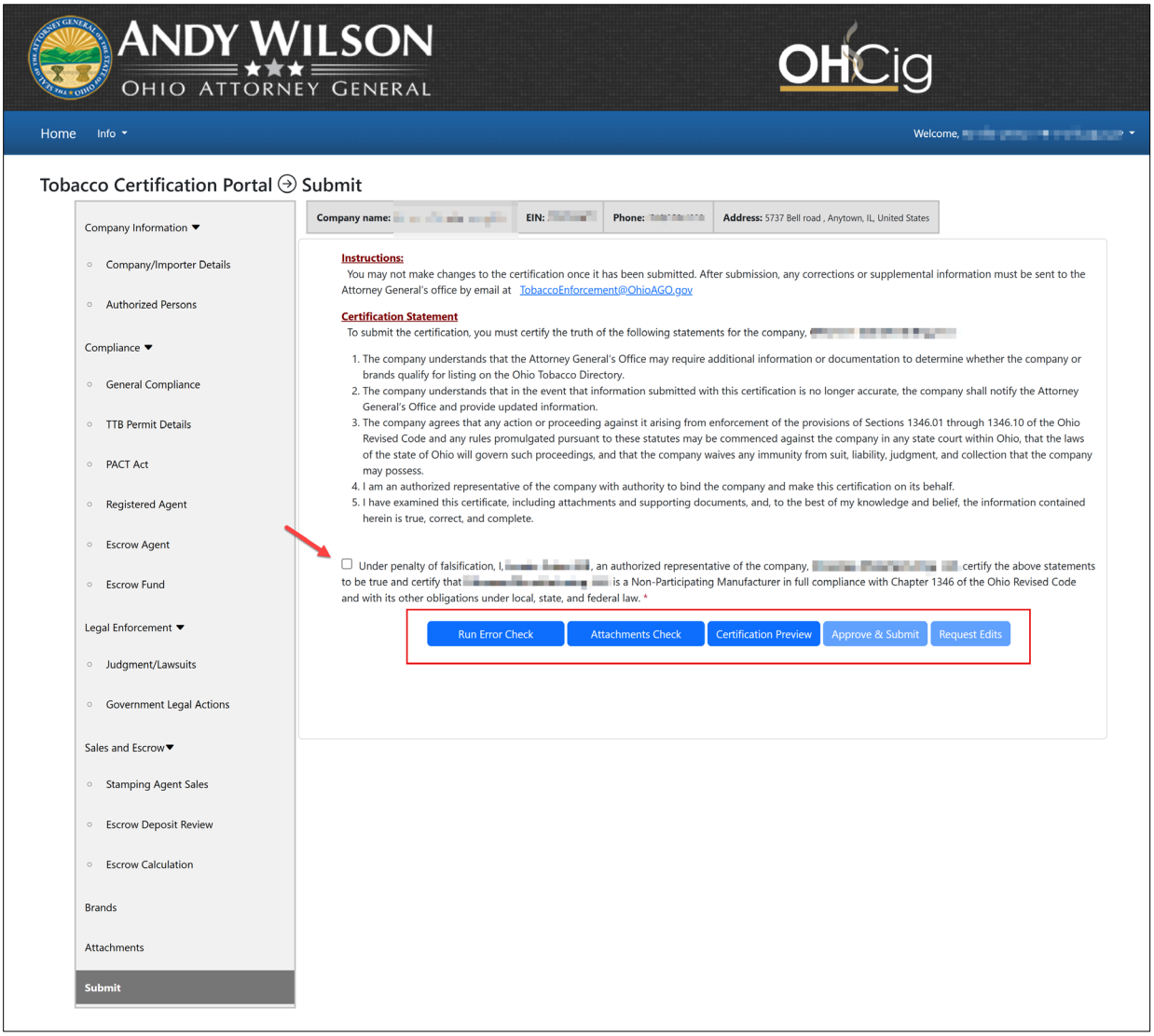



*Figure 6: Submit screen for Signature Authority Users*

After receiving a request for approval, a Signature Authority User should review the information in the certification and confirm that it is complete and accurate. If a Signature Authority User believes modifications are needed in the certification, the user should NOT submit the certification but should instead use the Request Edits button. This button notifies other company users that the certification is not ready for submission and makes the certification available for editing by all users.

Once satisfied that a certification is ready to submit, a Signature Authority User must electronically sign the certification. To do so, the user must first review and agree to the certification statement by checking the box on the Submit page. After agreeing to the statement, the user can submit the certification with the Approve & Submit button.

## 4.4 Modifying a certification after submission

**IMPORTANT: OHCig does not allow submitted certifications to be amended.** Once a certification has been submitted through the OHCig Portal, it cannot be modified. If a company discovers that any information in a submitted certification is inaccurate or incomplete, it should promptly notify the Attorney General's Tobacco Enforcement Unit by email explaining the issue. Once the company has the correct or additional information in hand, the company should send it to the Tobacco Enforcement Unit by email at TobaccoEnforcement@OhioAGO.gov.

# 5 Reporting Escrow Details

The functions described in this section pertain only to companies that are non-participating manufacturers (NPMs). Such companies are required to make escrow deposits for selling their products in Ohio. The escrowed funds must be maintained in a qualified escrow account for a period of time as designated by state law.

## 5.1 About escrow details

Any company that is required to make escrow deposits must report those deposits, along with any escrow withdrawals, to the Attorney General's Office. Companies can now report escrow transactions using the OHCig Portal rather than sending confirmation by email. However, escrow agents must still provide confirmation of deposits directly to the Attorney General's Office.

## 5.2 Providing escrow deposit details

Under the Escrow menu on the company Dashboard is an Escrow Deposits option. Selecting this option allows the user to record all escrow deposits made for any sales year. The screen requires a user to provide the deposit date, amount, and sales year and period for which the deposit was made. (If a deposit does not pertain to a specific quarter, the sales period should be marked as "Annual.")

A table at the bottom of the screen shows all deposits entered for the company. The deposits are summarized by sales year with the two most recent sales years shown separately. . A deposit record can be deleted and re-entered if necessary to correct any errors. Companies are encouraged to review their deposit records regularly and keep them up to date.

## 5.3 Providing escrow withdrawal details

The Escrow menu on the company Dashboard also includes an Escrow Withdrawals option. Selecting this option allows the user to record all withdrawals of escrow principal made during the year. The screen requires a user to provide the withdrawal date, amount, the sales year associated with the withdrawal, and the reason for the withdrawal.

A table at the bottom of the screen shows all withdrawals entered for the company. The withdrawals are summarized by sales year with the two most recent sales years shown separately. A withdrawal record can be deleted and re-entered if necessary to correct any errors. Companies are encouraged to review their withdrawal records regularly and keep them up to date.

## 5.4 Maintaining escrow account details

Currently, NPMs must provide the Attorney General's Office with current information about their escrow agents and qualified escrow accounts. The OHCig Portal allows companies to report this as part of their annual and quarterly certifications.

# 6 Updating Brand Packaging

## 6.1 About brand packaging

For any brand listed on the Ohio Tobacco Directory, a copy of the product packaging must be provided to the Attorney General's Office. This is typically done with a certification when adding a brand to the Directory or updating packaging during the annual certification.

## 6.2 Packaging update function

Companies may update brand packaging outside of a certification process by using the Packaging link in the Admin menu on the company Dashboard. Any packaging changes made here will carry forward to the next annual certification.

After clicking on the Packaging link, a user will see a page showing all the company's currently listed brands. Next to each brand is an option to upload a new packaging file for that brand. (All uploaded files must be in pdf format.) Please ensure that packaging for different brands are uploaded as separate files for the respective brands.

# 7 Viewing Company-Related Information

## 7.1 About company information

The OHCig Portal includes an area that provides users with summarized company information that is maintained in the system. This information is available from the Info menu on the company Dashboard.

## 7.2 Company historical information

Two types of company-specific historical information is available to review: Company brand history, and company certification history.

The Brand Families link shows all brands that the company has listed on the Ohio Tobacco Directory. This includes brands that are currently listed and those that are no longer listed. The page shows the listing and, if applicable, delisting dates for each brand.

The Past Certifications link shows an archive of all certifications submitted by the company for the past three years. The past certifications are organized by submission date. Users can also view the submitted certifications from this page. Certifications are removed from this page after three years, so companies should be sure to download and save copies of their submitted certifications for their own records.

## 7.3 Company public information

The Info menu also provides links to the Ohio Tobacco Directory and Public Notice webpages where the company can view the publicly available information about the company.

# 8 User Account Features

## 8.1 About account features

The OHCig Portal allows users to manage certain aspects of their individual accounts.

## 8.2 Changing password

A user's password can be changed from the system Sign-in screen. When logging into the system, choose the "Forgot your password?" link to reset and create a new password for your account.

## 8.3 User details (coming soon)

By using the My Account menu option, users can update the personal phone number associated with their account. Simply make the desired changes in the available data fields and save the changes. Other personal information cannot be changed because it is permanently linked to the account.

## 8.4 Email preferences

The My Account menu option also allows users to modify the automated emails they receive from OHCig. There is a simple opt-out toggle that, if selected, will stop the system from sending certification-related emails to that user. A user that opts out will still receive account-related emails (see Section 3.5 for examples of certification- and account-related emails).