OHCig

OHCig Certification Portal User Guide

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OHIO ATTORNEY GENERAL

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Table of Contents

OHCig Certification Portal User Guide

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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 manufacturers of 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 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 manufacturers of cigarettes and RYO tobacco 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.

In the first release of the OHCig Portal, manufacturers will be able to:

- File quarterly certifications.
- File supplemental certifications to update the Directory by adding and removing brands.
- Report escrow deposits.
- Maintain company contact details.

In subsequent releases, annual certifications, enhanced user preferences, and data reporting functions will be added to the application.

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.

OHCig Certification Portal User Guide

2 Logging In and Creating Accounts

2.1 How to log in to OHCig

From any web browser, visit https://tobaccocert.ohioattorneygeneral.gov/ to log in or create a new account from the Welcome page of the portal (shown below).
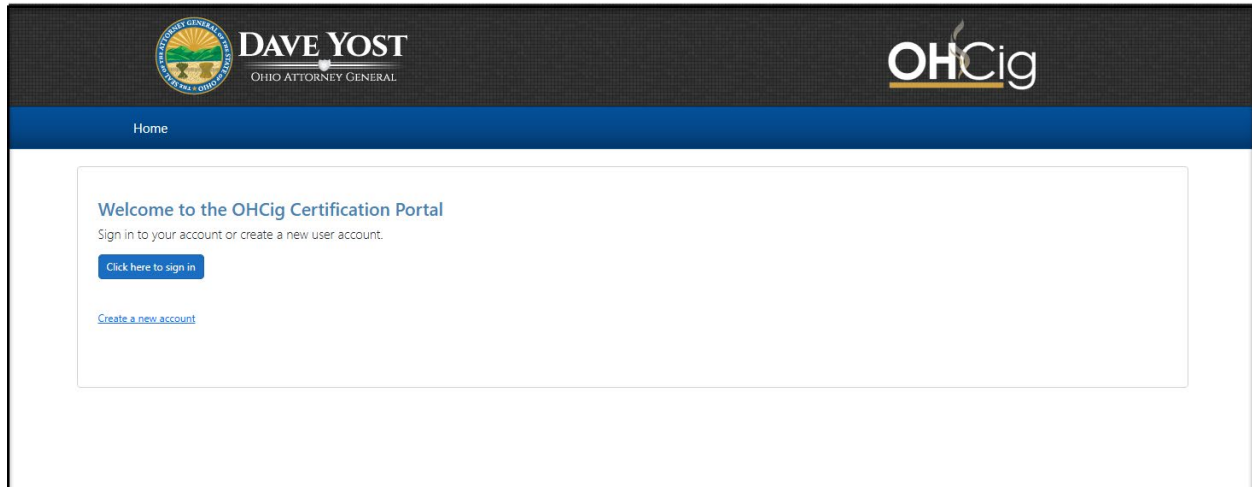
Figure 1: OHCig Welcome page

2.1.1 New users

New users start by clicking on the "Create a new account" link 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.
2. Then verify that the email belongs to the user (see image below). Once the email has been verified, the remaining information must be completed to establish the account.

Figure 2: New user email verification

OHCig Certification Portal User Guide

After creating an account, a new user signing in for the first time needs to identify his/her company from a dropdown list of available companies and request to be linked to the company account. A notification is 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 account roles.)

Important note: Each user account links to only one company, so separate user accounts **with different email addresses** must be created if a user wants to access OHCig on behalf of multiple companies.

2.1.2   Registered users

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

2.2   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.

2.3   User account 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.

2.3.1   Admin User

The Admin User manages user accounts for the company. This role includes approving all new user account requests, assigning or changing user roles, 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.

2.3.2   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 company user must be assigned 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.

2.3.3 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, 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 areas and blocks:

- Company information. This appears at the top and includes company name, type, directory status, and contact details.
- Messages
- System Announcements
- Requests for User Access (for Admin Users only)
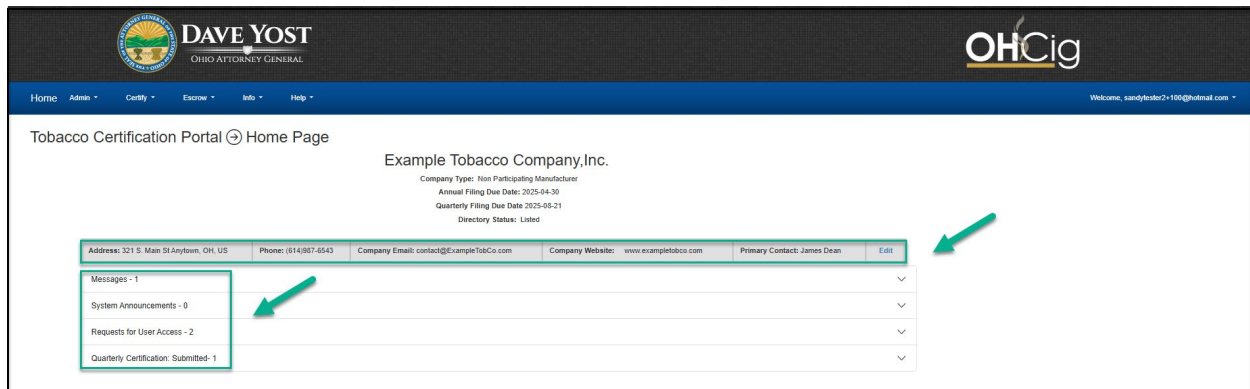- Certifications by type and current status

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 – and, in fact, are encouraged to ensure that these details are reviewed frequently for accuracy.

3.3   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.

3.4 Requests for user access

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

3.5 Certification work

Below the messages and announcements are various sections that show certifications the company has in progress or submitted. 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 blocks to resume work.

3.6 Menus and system functions

In the upper-left 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 current list of users and each user's role in the system
- **Certify**: Provides access to start each certification type relevant to the company
- **Escrow**: Allows for reporting 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
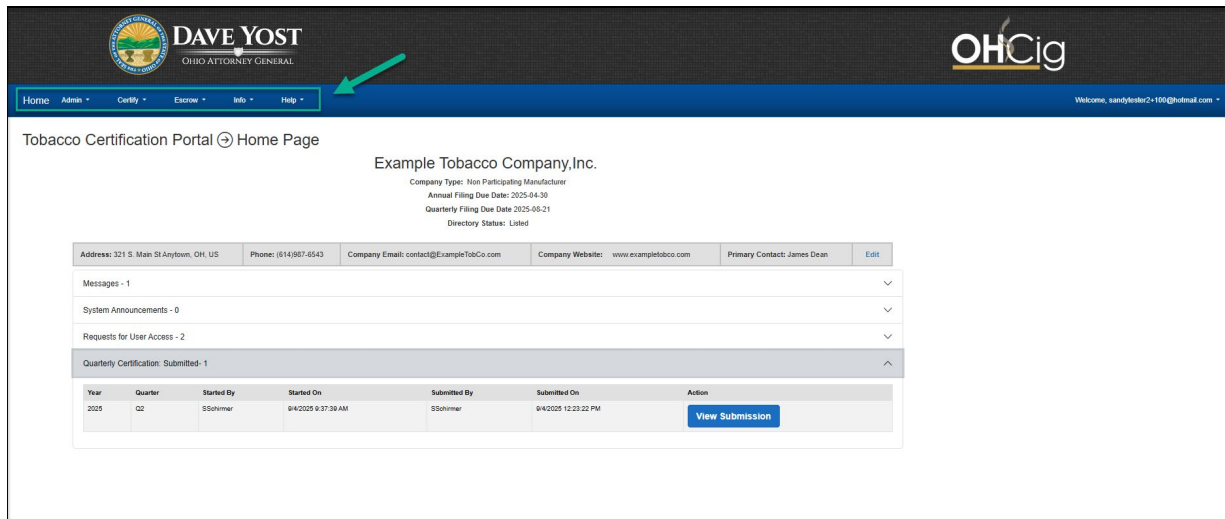

Figure 4: Menu options

3.6.1 Admin: Managing company users

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.

3.6.2 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 work 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 work 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.

3.6.3 Escrow: Reporting escrow details

The Escrow menu, which can only be seen by 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.

3.6.4 Info: Viewing informational reports

The Info menu provides links to selected reports about the company and its brands. This menu also provides links to the Ohio Tobacco Directory and Public Notice websites.

3.7 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 email notifications:

- When a new user logs in and requests access to your company's OHCig 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.
- 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.

OHCig Certification Portal User Guide

- When any type of certification is formally approved and submitted, company users and the Tobacco Enforcement Unit receive email notice of this action.

OHCig Certification Portal User Guide

4 Filing Certifications

4.1 About certifications

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

4.1.1 Annual certification [COMING IN A FUTURE RELEASE]

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

Users will be notified when this function becomes available.

4.1.2 Quarterly certification

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

4.1.3 Initial certification [COMING IN A FUTURE RELEASE]

An initial certification is required of a TPM 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.

Users will be notified when this function becomes available. Until an Initial Certification can be filed in OHCig, the latest annual certification form must be used for this purpose.

4.1.4 Supplemental certification – Add Brand

This type of supplemental certification is for TPMs currently listed on the Directory 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 TPMs 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 Starting a certification

When you start an annual or quarterly certification and proceed past the introduction screen, the system displays the Company Details page. You must review and update the company information before continuing. The list of Authorized Persons should include any individual authorized to communicate with the Attorney General's Tobacco Enforcement Unit regarding certification issues.

OHCig Certification Portal User Guide

One Authorized Person must be designated as the company's primary contact for certification purposes. You must click the Save button to preserve the newly added 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.
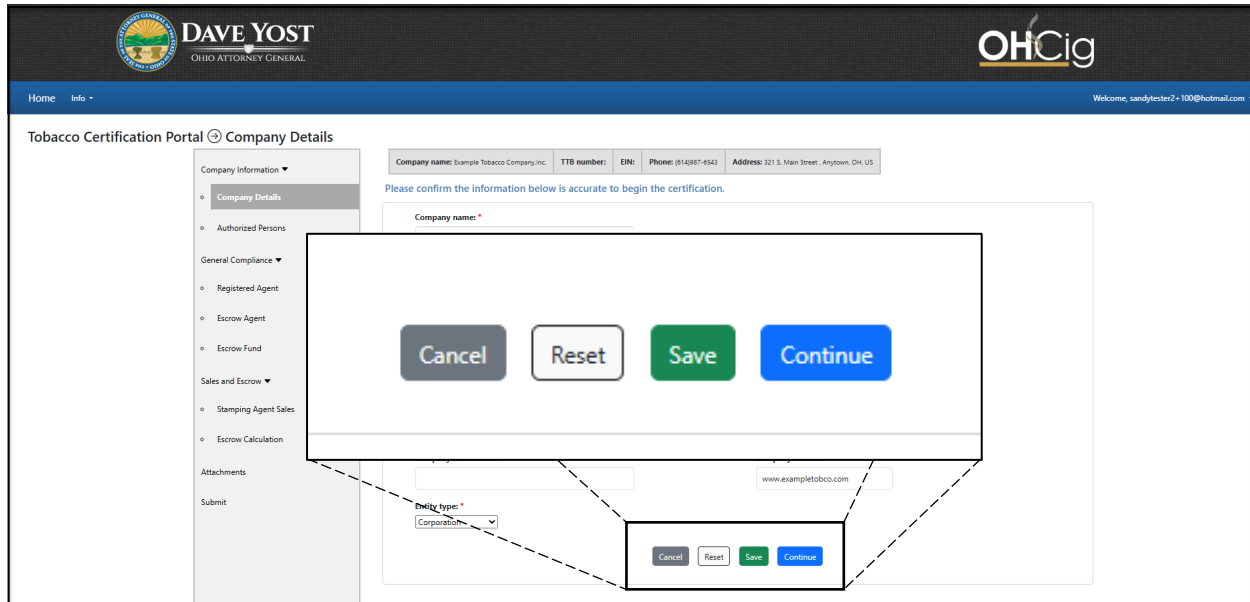

Figure 5: Navigation buttons within a certification

Each main certification section has this set of navigation buttons:

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

As you proceed through the certification, each page includes required fields or yes/no responses 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 data.** Otherwise, you may need to re-enter the data.

4.3   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

Figure 6: Submit screen for Admin Users and Data Entry Users

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.)

4.4   Finalizing and submitting a certification

Once a certification is complete, has been reviewed, and both Error Check and Attachments Check show no problems, you can proceed to the submission process.

4.4.1   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 2.2 | User account 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 submission and disables the ability to edit the certification.

If, after approval has been requested, 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 submission.

OHCig Certification Portal User Guide

4.4.2 For Signature Authority Users

Figure 7: Submit screen for Signature Authority Users

To submit the certification, a Signature Authority User must electronically sign the certification. To do so, the user must first review and agree to a certification statement. After agreeing to the statement, the user can submit the certification with the Approve & Submit button.

If a Signature Authority User believes modifications are needed in the certification, the user should NOT agree to the certification and should instead use the Request Edits button. This button notifies other company users that the certification is not ready for submission and allows the certification to be edited.

4.5 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. Instead, 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 provide it to the Tobacco Enforcement Unit by email or, if directed by the unit, another means.

You can reach the Tobacco Enforcement Unit 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 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.

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. A table at the bottom of the screen shows all deposits entered for both the current and previous sales years. A deposit record can be edited or deleted from the table until it is verified as part of the company's annual certification for that sales year.

5.3   Providing escrow withdrawal details [COMING IN A FUTURE RELEASE]

In the future, the Escrow menu on the company Dashboard will also include an Escrow Withdrawals option. Selecting this option will allow the user to record all withdrawals of escrow principal made during the year.

Users will be notified when this function becomes available.

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 [COMING IN A FUTURE RELEASE]

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.

In the future, companies may update brand packaging outside of a certification process by using one of the menu functions on the company Dashboard.

Users will be notified when this function becomes available.

7 Viewing Informational Reports

7.1 About informational reports

The OHCig Portal is being developed to include several types of reports that will provide users with summarized company information that is maintained in the system. These reports will be available from the Info menu on the company Dashboard.

Users will be notified as these reports become available.

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   Account preferences

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