



Department of Financial Services

USER MANUAL

FOR

SERVICING AGENTS

FOR THE

PRENEED REMITTANCE SYSTEM (PNRS)

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Overview

This document is created to assist the Servicing Agent (SA) users when using the Financial Services Producer Appointment System (eAppoint) web application. The eAppoint system has been enhanced to allow the Appointing entity (AE) to give permission to the SA users to report the Preaded Quarterly Remittance on their behalf through the online web application. The SA will need to request permission from each AE that they wish to do business with before they will be able to submit remittances for that AE.

The SA users will use the file upload functionality in eAppoint to report the quarterly remittances or addendums on behalf of the AE. This upload process requires only one electronic payment for all AE's that are included in the uploaded file.

The words invoice and submittal will be used in the document below and can be confusing. To better understand the difference between an invoice and a submittal, think of the submittal as the way the system allows you to pay an invoice.

The eAppoint URL is https://iportal.fldfs.com/FCCS_eAPPOINT/. This is the web site that will be used for log in and reporting quarterly remittances.

Left-Hand Menu Options

Common Task - Menu

In the left-hand menu section of the screen the Common Task section is displayed. This is where new invoices and submitted submittals can be found.

Start a New Submittal - Menu

This is the location in the eAppoint system that will allow the user to start the submittal process to report any quarterly remittances.

Review Paid/Final submissions - Menu

This is the location in the eAppoint system that will allow the user to see a list of all submittals that have been submitted. When a submittal has been selected, the information like the counts and amount paid can be reviewed and printed.

Other Places

eAppoint work bench - Menu

The eAppoint workbench will provide the user a list of all submittals that have been started but have not been paid or submitted. All submittals in this list have not been completed and could result in a citation for late reporting if not reported timely.

Creating a new eAppoint Account

Any party that wants to be a Servicing Agent and use the eAppoint system to report remittances on behalf of an AE must first set up an eAppoint account. When the account has been set up, they must request PNRS permission from each AE to allowing them to do business on the AE's behalf. The SA user

will only be able to report the quarterly remittances or addendums for the AE through the eAppoint system after the permission is given.

Create a Servicing Agency Account.

From the eAppoint URL, the home page allows new users to create an account and for existing users to log into the system.

1. To get started setting up your new account, using the left-hand menu option click “Set up a Servicing Agency Account” hyper-link.

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eAPPOINT

Log on to the Industry Portal

Please enter your user name and password to log on to the Industry Portal. Click 'submit' to continue.

User Name:


Password:


Submit

Common Tasks

- Register as appointing entity
- Activate your Appointing Entity account
- **Set up a Servicing Agency account**
- Retrieve lost password

2. Fill in all the required fields on the screen and then click on the Create Account button. All required fields are noted with a red asterisk (*). The E-Mail address that is entered on this screen will be used by the Division for sending notification to you and will also be used as the eAppoint "User Name" when you log into the system.

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Account Tasks

- [Update your account](#)
- [View your account](#)

Set Up An Servicing Agency Account

This page allows you to setup a new Industry Portal account. Please fill in the following fields and click "Create Account" at the bottom of this page when you are finished. If you do not want to create an account, please click "Cancel". In order to create a new account you must fill in all the fields marked with a red star (*).

NOTE: The email address you fill in will be your User Name to access the Industry Portal. Please fill in an email address that you have access to, as you will need access to this email address to activate your account.

Personal

* First Name:

Middle Initial:

* Last Name:

* E-Mail Address (User Name):

* Password:

* Re-type Password:

Phone

* Phone Number:

Phone Extension:

Fax Number:

Address

* Street:

Optional Street:

* City:

* State:

* ZIP/Postal Code:

* Country:

Position

Position Title:

Department Name:

3. If you have filled out all fields correctly the Set Up An Account screen will display the message that the account was successfully created. Click the Done button.

The screenshot shows the top navigation bar for the eAPPOINT system, featuring the Florida state seal and the name 'JIMMY PATRONIS, FLORIDA'S CHIEF FINANCIAL OFFICER'. Below this are navigation links: Home, Help, Contact Us, My Account, DFS Home, and Logout. The main content area is titled 'Set Up An Account' and displays a success message: 'An account has been successfully created.' Below the message is a paragraph explaining that an email has been sent to the user's provided email address, containing instructions for account activation. A 'Done' button is located at the bottom of the message area. On the left side, there is a sidebar with the eAPPOINT logo and a 'Common Tasks' section containing a link for 'Set up an account'.

4. The system will automatically send an email to you. There is a link in the email that **MUST** be used to activate your account. Watch for this email to complete the setup of your new account.

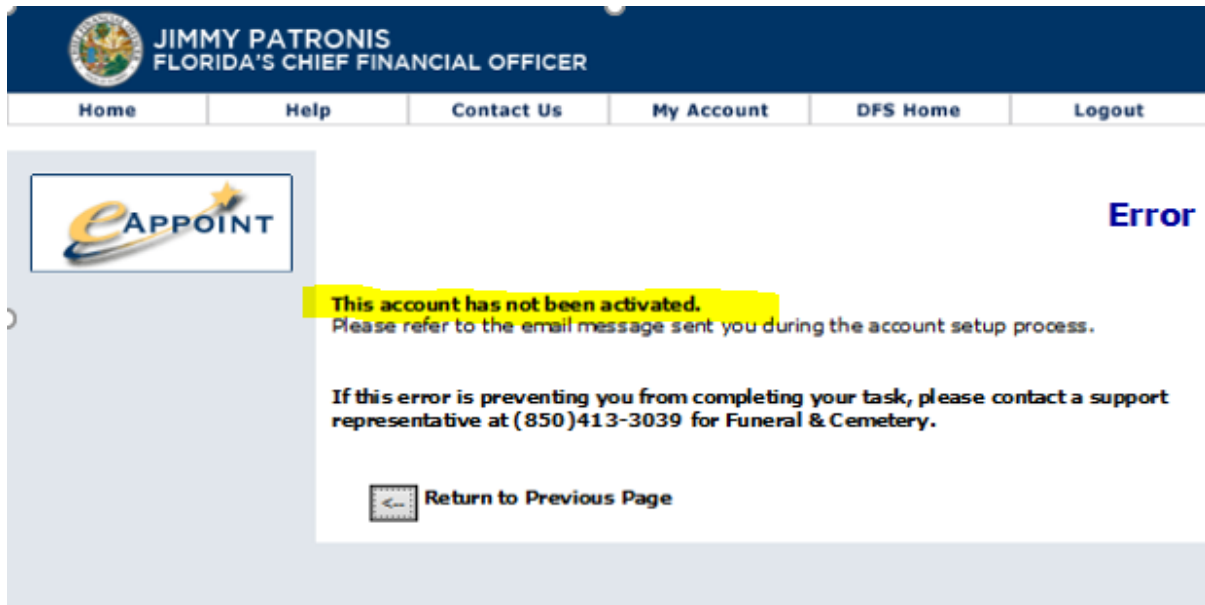
Request Permission from Appointing Entity

Once your account has been created, you will need to **contact each of the Appointing Entities (AE)** that you wish to do business with and ask them to grant your permission to work on their behalf. You will need to provide the AE with the email address that was used to set up your SA eAppoint account so permission to the correct account can be granted. After the AE has given you permission, then you will be able to do business on behalf of that AE in the eAppoint system.

Activate your eAppoint account.

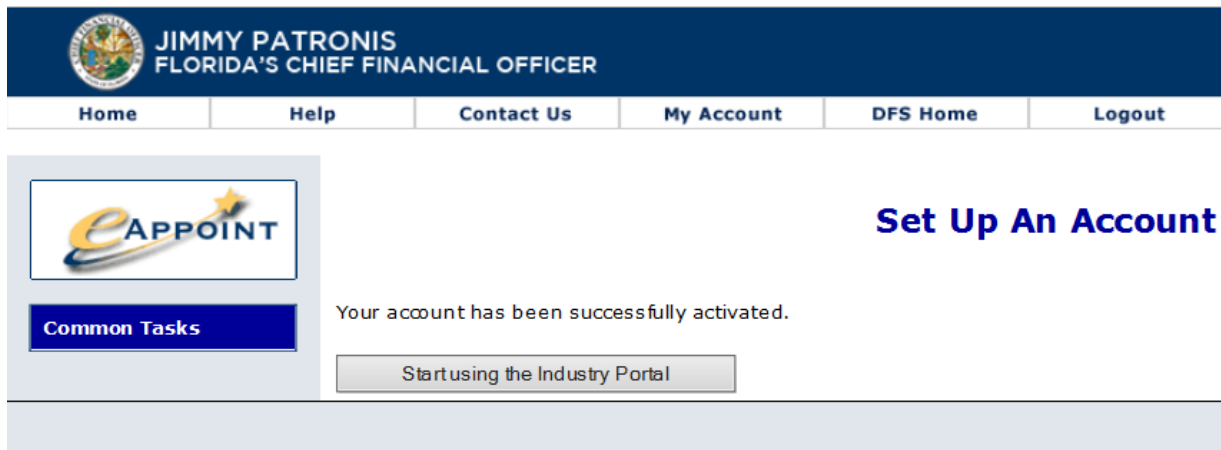
Once your account has been created the system will send an email to the email address that was used to create the account. The email will contain a link that should be used for activating your eAppoint account.

1. If you have not activated your account and you try to log in, you will see this message displayed.



The screenshot shows the top navigation bar for Jimmy Patronis, Florida's Chief Financial Officer, with links for Home, Help, Contact Us, My Account, DFS Home, and Logout. The main content area features the eAppoint logo on the left and an error message on the right. The error message is titled "Error" and states: "This account has not been activated. Please refer to the email message sent you during the account setup process." Below this, it provides contact information for support: "If this error is preventing you from completing your task, please contact a support representative at (850)413-3039 for Funeral & Cemetery." A "Return to Previous Page" button with a left arrow icon is located at the bottom of the message area.

2. In the email that is sent, when you click on the link to activate your account you will see this message.



The screenshot shows the same top navigation bar as the previous image. The main content area features the eAppoint logo on the left and a success message on the right. The success message is titled "Set Up An Account" and states: "Your account has been successfully activated." Below this message is a button labeled "Start using the Industry Portal". On the left side of the main content area, there is a "Common Tasks" button.

- Once you have activated your account, try logging into the system. Use the email address as the "User Name" and the password that you entered when creating the account, then click the Submit button.

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eAPPOINT

Log on to the Industry Portal

Please enter your user name and password to log on to the Industry Portal. Click 'submit' to continue.

User Name:

Password:

Submit

Common Tasks

- Register as appointing entity
- Activate your Appointing Entity account
- Set up a Servicing Agency account
- Retrieve lost password

- If no AE has given you permission, this message will be displayed.

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eAPPOINT

Error

This account is not authorized to use the eAppoint system. If you are an appointing entity, please complete the Appointing Entity Registration process. If you are a third party who wishes to work on behalf of an appointing entity, please give that appointing entity your E-Mail address.

If you are a Department employee who wishes to work on behalf of an appointing entity, please complete the Exception Submittal Account Validation process to grant yourself access to eAppoint.

If this error is preventing you from completing your task, please contact a support representative at (850)413-3039 for Funeral & Cemetery.

[<- Return to Previous Page](#)

Upload File Format

The eAppoint system requires the Servicing Agent account to upload a file to report their quarterly remittances. Below are the requirements that must be followed for creating the upload file. The system uploads the file data directly into the eAppoint system and allows the SA to make the necessary payment to complete the quarterly remittance submittal.

The system allows the SA to upload multiple files during the quarter in case adjustments are needed for remittances that have already been reported. There is no limit to the number for AE remittances that can be included in the file; it can contain only one AE's remittance or multiple AEs. The file can also handle new remittances for the quarter as well as addendums for AE that might have already been reported.

File Upload Format Requirements

The following are the requirements for the upload file.

1. The file must be a .txt or .CSV document type.
2. The file must be in the below comma delimited format.
3. The first row in the file must contain the header row:
 YEAR,QUARTER,FEIN,AE_NUM,LICENSEE_NAME,TRUST_FUNDEDKS,INSURANCE_FUNDEDKS,CANCELLED,COMMENTS

Here are the list of fields and their description for creating the upload file.

Field Name	Required	Type	Restrictions
YEAR	Yes	Number	Must be 4 digits and between 1901 and the current year.
QUARTER	Yes	Number	Must be 1 digit (Values: 1, 2, 3, 4)
FEIN	Yes	Number	Must be 9 digits
AE_NUM	Yes	Number	Max of 7 digits
LICENSEE_NAME	Yes	VarChar	Max length of 255
TRUST_FUNDEDKS	Yes	Number	Max length 10
INSURANCE_FUNDEDKS	Yes	Number	Max length 10
CANCELLED	Yes	Number	Max length 10
COMMENTS	No	VarChar	Max length is 500 characters. *** This is required ONLY when reporting Addendums. ***

4. Here is an example file layout with three appointing entity numbers being reported:

```
YEAR, QUARTER, FEIN, AE_NUM, LICENSEE_NAME, TRUST_FUNDEDKS, INSURANCE_FUNDEDKS, CANCELLED, COMMENTS  
2017, 2, 999999999, 175460, TALLAHASSEE FUNERAL HOME, 9, 1, 0, ,  
2017, 2, 999999988, 175461, MONTICELLO FUNERAL HOME, 2, 0, 0, ,  
2017, 1, 999999977, 175462, PENSACOLA FUNERAL HOME, 7, 1, 1, CONTRACT CANCELLED NOT REPORTED
```

5. The upload file name is not important to our system, but we do suggest that you name the files so you are able to track and select the correct file that you want to upload while doing your submittals. *Below is an example of the file names that are being used in the old system but is NOT a requirement in the new system.*

Example File name: SA-BulkRemittance(YYYY-QT)

- In the file name SA-BulkRemittance(YYYY-QT), the SA should represent the servicing agent name.
- The file name SA-BulkRemittance(YYYY-QT), should always contain “-BulkRemittance”.
- In the File name SA-BulkRemittance(YYYY-QT), the YYYY should represent the remittance four-digit year.
- In the File name SA-BulkRemittance(YYYY-QT), the “Q” should represent the remittance quarter (1, 2, 3, 4).
- In the File name SA-BulkRemittance(YYYY-QT), the “T” is used to indicate the sequence of reports for that year and quarter. The initial will be A and then incremented for each additional addendum.

Here are a couple of examples file names:

FSI-BulkRemittance(2017-4A) ---- and example for an initial report

FSI-BulkRemittance(2017-4B) ---- for the first addendum reported for a quarter

FSI-BulkRemittance(2017-4C) ---- for the second addendum reported for a quarter

Start a new submittal

The new submittal is where you will start to process for uploading the quarterly remittance or addendum for all the AEs that you do work for.

NOTE: When reporting counts for addendum, you must report the **new counts for the quarter not just the counts being adjusted**. For example, if you reported 10 trust funded contracts, 9 insurance funded contracts, and 0 cancelled contracts and realized that you should have report 11 trust funded contracts, your upload file should reflect 11 trust funded contracts, 9 insurance funded contracts, and 0 cancelled contracts and a note for the adjustment.

NOTE: The PNRS Upload function can handle quarterly remittances for an AE and addendums for another AE in the same file.

1. Start by clicking on the Start a new submittal link from the left-hand menu.

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eAPPOINT

Common Tasks

- **Start a new submittal**
- Review Paid/Final submissions

Other Places

- eAppoint workbench

eAppoint

Welcome to the Florida Department of Financial Services Producer Appointment System (eAppoint). Here, you can send appointment-related submissions to the Department. To begin, click **Start a new submittal**. To work on an existing submittal, click **Work on an in-progress submittal**. To review a submission already sent to the Department, click **Review Paid/Final submissions**. To activate your appointing entity account, click **Activate your Appointing Entity Account**.

Refund Policy fo Preneed Sales Agent Appointment-Related Submission

The appointment fee is not subject to refund in accordance with section 469.466 (2)(h) F.S. and Rule 69K-5.003(6) F.A.C. If a duplicate appointment is processed, a refund may be requested in writing by the payor within 60 days of a duplicate appointment, the Division shall refund the payor entitled to receive in connection with the application for the appointment.

Please contact the Division of Funeral, Cemetery, and Consumer Services for questions by phone (850) 413-3039, mail or fax.

Choose a Task

 Start a new submittal	 Work on an in-progress submittal	 Review Paid/Final submissions
---	--	--

- This page just provides some information about pop-up messages. Just click the Next button to continue.

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eAPPOINT

Start a New Submittal

Welcome to the eAppoint Wizard

The following screen will ask you to select what type of "submittal" you want to start. There are 7 types of submittals: New Appointments, Renewal Appointments, Terminate Appointments, Preneed Quarterly Remittance, Preneed Quarterly Remittance Addendums, Payment for Preneed Quarterly Remittance Citations, Addendums required as result of financial examination. Any one submittal may have multiple agent transactions in it, but those transactions must all be of the same type. For example, a New Appointments Submittal might appoint five or ten different new agents to represent you, but could not include any appointment terminations or renewals.

WARNING: This website uses pop-up messages to inform you of important information and directions regarding your submittal to the Florida Department of Financial Services. You must disable or turn-off your pop-up blocker for this website if you are using such a feature within your web browser in order to view these important messages.

Click "Next" to continue.

Cancel Next

- On the Select Submittal Type screen you would select the PNRS Upload Function and click the Next button.

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eAPPOINT

Select Submittal Type

Select the type of submittal you want to start. Click "Next" to continue.

Select type of submittal

PNRS Upload Function

Cancel Back Next

- On the New Submittal Created screen you will name the submittal and click the Done button.

NOTE: We suggest that you name the submittal something that will be helpful when trying to find this submittal in the future. An example would be to indicate the year and quarter as shown below.

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eAPPOINT

New Submittal Created

A new submittal has been started, as indicated below.

Submittal Type: PNRs Upload Function
Date Created: 5/10/2018 01:41:43 PM

You can give this submittal a name in the block below. Naming the submittal is optional. Most Preened Business Licensees develop their own internal protocols for naming submittals, that are meaningful for them given the way they run their business. For more info on naming a submittal, click on the HELP tab above.

Submittal Name:

Done

- This takes you back to the Main Workbench page where you should see the submittal you just created.

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eAPPOINT

Main Workbench

Below is a list of submittals you have created but not yet completed. If you just opened a submittal, it is included below. Click on any listed submittal, to open and work on it. If you want to delete any listed submittal, click on DELETE SUBMITTAL below, and you will be given a screen from which to choose which submittal to delete.

WARNING: This website uses pop-up messages to inform you of important information and directions regarding your submittal to the Florida Department of Financial Services. You must disable or turn-off your pop-up blocker for this website if you are using such a feature within your web browser in order to view these important messages.

Choose a submittal to work on

Appointing Entity	Type	Name	Type	Date Created
	PNRS Upload Function	2017-Q4-Quarterly Remittance	ORIGINAL	5/10/2018 01:41:43 PM

Delete Submittal

- When you are ready to continue working on this submittal, just click on the "Type" hyper-link that is associated with the submittal that you want to work with.

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eAPPOINT

Main Workbench

Below is a list of submittals you have created but not yet completed. If you just opened a submittal, it is included below. Click on any listed submittal, to open and work on it. If you want to delete any listed submittal, click on DELETE SUBMITTAL below, and you will be given a screen from which to choose which submittal to delete.

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Choose a submittal to work on

Appointing Entity	Type	Name	Type	Date Created
	PNRS Upload Function	2017-Q3 Quarterly remittance	ORIGINAL	5/10/2018 01:46:06 PM
	PNRS Upload Function	2017-Q4-Quarterly Remittance	ORIGINAL	5/10/2018 01:41:43 PM

Delete Submittal

- The Preneed Quarterly Remittance screen displays the submission information and the payment status. Click on the "Component" hyper-link to open this submittal.

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eAPPOINT

Preneed Quarterly Remittance

Submittal Type: PNRS Upload Function
Date Created: 5/10/2018 01:41:43 PM
Submittal Name: 2017-Q4-Quarterly Remittance

Edit Submittal Name

Listed below are all the components required to submit this submittal. To view a component, click on its name. Your changes are automatically saved. To review the current details of your submittal, click "Review this Submittal".

Component	Last Updated	Submission Status	Payment Status
Preneed Quarterly/Addendum Remittance	5/10/2018 01:41:43 PM	Incomplete	Incomplete

Review this Submittal Submit

Return to Main Workbench

8. The Upload Preened Quarterly Remittance screen provides you with a link to access the upload file format just in case if you need the information. If you have already to upload your remittance file click the Browse button and search for the file on your computer.

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eAPPOINT

Upload Preened Quarterly Remittance

Select the file you wish to upload for Preened Quarterly Remittance. To choose a file, click Browse. Navigate to the location of the file on your computer, and click Open. After you have selected the file you wish to upload, click Upload. If you do not wish to upload any files, click Cancel.

For information on the appropriate file layout, please dick [here](#).

If you are currently using a "Popup Blocker", you will need to allow popups on this website.

The records in the file will be validated by the system. If any record fail the validation, the whole file will not be uploaded and must be corrected and re-submitted. Validation errors will be displayed if needed.

DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS

File to upload Browse...

Cancel Upload

9. Once you have selected the file that is located on your computer, the file name should display in the "File to upload" field. Click the Upload button so the data can be uploaded to the eAppoint system.

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eAPPOINT

Upload Preened Quarterly Remittance

Select the file you wish to upload for Preened Quarterly Remittance. To choose a file, click Browse. Navigate to the location of the file on your computer, and click Open. After you have selected the file you wish to upload, click Upload. If you do not wish to upload any files, click Cancel.

For information on the appropriate file layout, please dick [here](#).

If you are currently using a "Popup Blocker", you will need to allow popups on this website.

The records in the file will be validated by the system. If any record fail the validation, the whole file will not be uploaded and must be corrected and re-submitted. Validation errors will be displayed if needed.


DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS

File to upload Browse...


Cancel Upload

10. The system will first validate the file for any errors that may exist. If any errors are found, system will display an error message for each of the rows that did not pass our validations.

NOTE: The uploaded file must be error free before any of the data will be imported into the eAppoint system.

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Preneed Quarterly Remittance Upload Errors

NONE OF THE 2 RECORDS WERE UPLOADED DUE TO VALIDATION ERRORS.

The following record(s) failed the validation rules. Please correct the record(s) and upload them again.

Line #: 1	Record: 2017,4,473173104,175516,YOUR TRADITIONS LLC,2,5,1,COMMENTS GO HERE
<ul style="list-style-type: none">The current logged user, does not have authorization to submit a Preneed Remittance Sales file for this FEIN/AE Num.	
Line #: 2	Record: 2017,4,472173104,175516,YOUR TRADITIONS LLC,2,5,1,COMMENTS GO HERE
<ul style="list-style-type: none">AE_NUM/Fein does not match with our records.	

[Return to Submission](#)

Here is a list of errors that you might encounter:

1. *The current logged user, does not have authorization to submit a Preneed Remittance Sales file for this FEIN/AE Num.*
 - a. The SA user will need to request permission from that AE before they will be able to report quarterly remittances for that AE.
2. *AE_NUM/Fein does not match with our records.*
 - a. Check the file AE Number and FEIN, the combination does not match with the eAppoint system. Contact the Division of Funeral, Cemetery and Consumer Services for the correct information if needed.
3. *The YEAR must contain 4 digits.*
 - a. The file "year" field must be a four-digit year value.
4. *The reported counts must be zero or greater.*
 - a. The count for the trust funds, insurance funds and cancelled contacts cannot contain an alpha character, be a negative number or be left empty.
5. *There is no invoice in our records for the specified Year/Quarter.*
 - a. Please check the year and quarter being reported for that AE, the system does not find an invoice that matches.

6. *The invoice for the specified Year/Quarter was included in another filing submittal, that is still pending to be submitted. You must submit/delete that filing, before reporting the same invoice (Year/Quarter) again.*
 - a. Check your Workbench, it appears that this AE quarterly count for that year and quarter is on an existing submittal that has not yet be paid and submitted.
7. *Comments must be provided when submitting an addendum.*
 - a. The system requires a "Comment" when reporting as addendum.
8. *This FEIN/Year/Quarter appears more than once in this file.*
 - a. The file contains two rows for an AE for the same year, and quarter.
9. *The count of Cancelled Contracts should be equal or less than the count of Trust Fundedks and Insurance Fundedks.*
 - a. Check the counts for this record, you cannot have more cancelled contracts than contracts that were sold for that quarter and year.

11. If you need to review the errors a the file that was last uploaded, the list of errors can be found if you open the submittal from your eAppoint Workbench and click the link at the bottom of the page.

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Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Preneed Quarterly Remittance

Submittal Type: PNRS Upload Function
Date Created: 5/10/2018 01:41:43 PM
Submittal Name: 2017-Q4-Quarterly Remittance

Edit Submittal Name

Listed below are all the components required to submit this submittal. To view a component, click on its name. Your changes are automatically saved. To review the current details of your submittal, click "Review this Submittal".


Component	Last Updated	Submission Status	Payment Status
Preneed Quarterly/Addendum Remittance	5/10/2018 01:41:43 PM	Incomplete	Incomplete

Review this Submittal

Submit


Return to Main Workbench

12. Then you can click on the hyper-link at the bottom of the page.



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Upload Pread Quarterly Remittance

Select the file you wish to upload for Pread Quarterly Remittance. To choose a file, click Browse. Navigate to the location of the file on your computer, and click Open. After you have selected the file you wish to upload, click Upload. If you do not wish to upload any files, click Cancel.

For information on the appropriate file layout, please click [here](#).

If you are currently using a "Popup Blocker", you will need to allow popups on this website.


The records in the file will be validated by the system. If any record fail the validation, the whole file will not be uploaded and must be corrected and re-submitted. Validation errors will be displayed if needed.

DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS

File to upload


[View the last set of upload errors for FSI-BulkRemittance\(2017-4A\).txt >>](#)

13. The system will then display the list of errors that were in the previous file.



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Pread Quarterly Remittance Upload Errors

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The following record(s) failed the validation rules. Please correct the record(s) and upload them again.

Line #: 1	Record: 2017,4,473173104,175516,YOUR TRADITIONS LLC,2,5,1,COMMENTS GO HERE
	<ul style="list-style-type: none">The current logged user, does not have authorization to submit a Pread Remittance Sales file for this FEIN/AE Num.
Line #: 2	Record: 2017,4,472173104,175516,YOUR TRADITIONS LLC,2,5,1,COMMENTS GO HERE
	<ul style="list-style-type: none">AE_NUM/Fein does not match with our records.

14. Once all errors have been corrected you will open the submittal from the eAppoint Workbench. Browse to find the updated file on your computer and click the Upload button. If the file has no errors the eAppoint system will display you this message. Click the Pay & Submit button to make the payment or the Review Submittal to review the submittal before paying.

15. If you want to review what was included on this submittal, click the Review Submittal button.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

Home Help Contact Us My Account DFS Home Logout

eAPPOINT

Upload Preneed Quarterly Remittance

[Review Submittal](#) [Pay & Submit](#)

1 of 1 record in "goodFileDev.txt" was successfully uploaded. The file upload component has been completed.

16. The Review Recent Submissions screen will display all the information about the file that was uploaded. This example was a file that only included one AE remittance for the quarter.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

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eAPPOINT

Review Recent Submissions

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Payment Transaction Details

Submission ID	000000000
---------------	-----------

Fee Type

Fee Type	Amount
PNRS Upload Function Fees	\$35.00
Processing Fee	\$0.00
Total Fees	\$35.00

Invoice Details

Submitted By:	June Leverette
Date Submitted:	

The following invoice(s) have been submitted:

Record Type	Invoice Number	AE # / Firm Name	Year/Quarter	Trust Fund Contracts	Insurance Funded Contracts	Cancelled Contracts	Fees (\$)
Addendum	Q12018-9451	115663 / [REDACTED]	2018/Q1	3	2	0	35.00
Previously Reported Count				-	-	-	
New Count				3	2	0	
Adjusted Count				3	2	0	

[Return to Main Workbench](#) [Print](#)

17. If you clicked on the Pay & Submit button you will see Payment Wizard screen before going to the Bank website to make the payment. Click the Next button to continue.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

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eAPPOINT

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Payment Wizard

Bank Of America is the vender selected by the Department of Financial Services to process online payments. Processing fees are assessed by and paid directly to Bank Of America, and are not assessed or retained by the Department. Click on CANCEL to return to the Workbench. Clicking on CANCEL will not delete or change information you have entered in the submittal, and the submittal will still be available to you on your Workbench for further processing. However, your online submittal will not be effective until you submit and pay it online.

Cancel Next

18. This screen displays the total fees that will need to be paid. Click the Next button to continue.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

Home Help Contact Us My Account DFS Home Logout

eAPPOINT

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Payment Wizard

Fees required for this online transaction are indicated below. Processing fees are assessed by and paid directly to Bank Of America, and are not assessed or retained by the Department. Click on CANCEL to return to the Workbench. Clicking on CANCEL will not delete or change information you have entered in this submittal, and the submittal will still be available to you on your Workbench for further processing. However, your online submittal will not be effective until you submit and pay it online.

Fee Type	Amount
PNRS Upload Function Fees	\$35.00
Total Fees	\$35.00

Cancel Next

19. On the electronic signature page, you will need to check the box and then fill in the signature and business phone fields. Then select the payment method, either credit card or eCheck.

NOTE: When paying with a credit card, a convenience fee will be added to the total amount due.

Paying with an eCheck, no additional fees will be applied.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

Home Help Contact Us My Account DFS Home Logout

eAPPOINT

Payment Wizard

This is the electronic signature page. Click on the box adjacent to the text to indicate agreement to the statement in the text. Then type in the name and business phone of the Preneed Business Licensee's staffer or other authorized representative who is making this submittal for that Preneed Business. Then select a payment option, and click on NEXT. Click on CANCEL to return to Workbench. Clicking on CANCEL will not delete or change information you have entered in this submittal, and the submittal will still be available to you on your Workbench for further processing. However, the online submittal will not be effective until you submit and pay it online.

Signature:


Business Phone:

Payment Method: Credit Card eCheck

Cancel Next

Credit Card Payment

20. If you have selecte the credit card payment method you will be taken to the bank website where you will fill out the information needed to make your payment.



JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

Enter Payment Information

Your account details are shown below. Please enter details of the payment you want to make, and then select Continue to proceed.

⚠ You have selected to pay using a Card Account. The payment type cannot be changed on this payment screen. If you need to change the payment type, please select the Cancel button at the bottom of this page to go back and change your selection.(1004)

Enter Payment Information

Retrieved Account Details

Account Number : 1434785

Email Address* : test_account@gmail.com

Funding Source Details

Payment Method* : Card Account

Name on Card* : test user

Card Number* : *****

Expire Date* : 12/18
(mm/yy)

Card CVV No* : ***
[What is this?](#)

Address Line 1* : 123 test avenue

Address Line 2 :

City* : Tallahassee

State* : Florida

Country* : USA

Zip* : 32301

Enter Payment Details

Payment Date : 06/06/2018

Payment Amount* : Payment Amount Due (\$632.10) This is Payment Amount Due


Enter Additional Payment Details

Total Services Amount : \$ 602.00


Convenience Fee : \$ 30.10

Applicant Name : ██████████

Your Account will not be charged until the Payment is confirmed on the next page



21. On the bank website Verify Payment Detail screen, click the Confirm button.



JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

Verify Payment Details

Please review the details of the payment you have entered and select Confirm to submit the payment for processing.

Verify Payment Details

Account Details

Account Number : 1434545
Email Address : june.leverette@myfloridacfo.com

Funding Source Details

Name on Account : test ach
Account Type : Checking
Routing Number : 063000047
Account Number : Checking - xxxxxx7890

Payment Details


Payment Date : 05/14/2018
Payment Amount : \$ 35.00

Additional Payment Details

Total Services Amount : \$ 35.00
Convenience Fee : \$ 1.75
Applicant Name : june testing

By clicking Confirm to confirm your payment, you authorize us to initiate a debit from the Payment Method Account to make a payment to the Account, as detailed above. The payment to your account will be made on the Payment Date detailed above, and the debit from your account will occur within two business days of that date, but no earlier than that date. You also authorize your financial institution (and its successors or assigns), to process this debit to your account.

Additionally, by clicking confirm, you also agree to and accept the Terms & Conditions for usage of this site.



22. The bank website will return you back to the eAppoint system and you will also receive an email from the Bank about your payment.

Dear Valued Customer,

This email is to confirm your authorization for an electronic debit from your funding account ending XXXX7890 payable to Florida Division of Funeral, Cemetery and Consumer Services on 05/14/2018 through Online Payment Processing.

Payment ID: [REDACTED]

Payment Amount: [REDACTED]

Your confirmation number for this payment is 04601T16Y9.

The payment will be effective on 05/14/2018 or shortly thereafter.

Section 215.34, Florida Statutes, provides for a service fee to be charged on all returned payments. The Department will charge a service fee of fifteen dollars (\$15.00) or 5% of the returned payment, whichever is greater. The amount of the service fee will not exceed \$150.00.

Florida Division of Funeral, Cemetery and Consumer Services

About This Message

This email was sent to [REDACTED]@om.

Account Related Questions:

Do not reply to this message. Please contact our office with your questions or concerns.

Phone: 850-413-3039


Address: DIVISION OF FUNERAL, CEMETERY AND CONSUMER SERVICES

200 EAST GAINES STREET

TALLAHASSEE, FLORIDA 32399-0361


eCheck Payment

23. If you want to make an eCheck payment, on the Payment Wizard page check the eCheck radio option and click the Next button.



JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

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Payment Wizard

This is the electronic signature page. Click on the box adjacent to the text to indicate agreement to the statement in the text. Then type in the name and business phone of the Preneed Business Licensee's staffer or other authorized representative who is making this submittal for that Preneed Business. Then select a payment option, and click on NEXT. Click on CANCEL to return to Workbench. Clicking on CANCEL will not delete or change information you have entered in this submittal, and the submittal will still be available to you on your Workbench for further processing. However, the online submittal will not be effective until you submit and pay it online.

Signature:

Business Phone:

Payment Method: Credit Card eCheck

24. On the bank website, you will need to fill in the account information and click the Confirm button.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

Enter Payment Information

Your account details are shown below. Please enter details of the payment you want to make, and then select **Continue** to proceed.

Warning: You have selected to pay using a Bank Account. The payment type cannot be changed on this payment screen. If you need to change the payment type, please select the **Cancel** button at the bottom of this page to go back and change your selection. (1035)

Enter Payment Information

Retrieved Account Details

Account Number : 1434793
Email Address* : test_user@test.com

Funding Source Details

Payment Method* : Bank Account

Memo: 080989430 0014409843 1436
Routing Number Account Number

Name on Account* : test Account

Personal or Commercial Account* : Personal Bank Account
 Commercial Bank Account

Account Type* : Checking

Routing Number* : 063000047
Re-Enter Routing Number* : 063000047

Account Number* :
Re-Enter Account Number* :

Enter Payment Details

Payment Date : 06/04/2018
Payment Amount* : Payment Amount Due (\$217.00) This is Payment Amount Due


Enter Additional Payment Details

Total Services Amount : \$ 217.00
Convenience Fee : \$ 0.00
Applicant Name : test user

Your Account will not be charged until the Payment is confirmed on the next page

Cancel **Continue**

25. On the bank website Verify Payment Details screen, you will verify the information and then click the Confirm button. Once you Confirm the payment you will be returned to the eAppoint system.



JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

Verify Payment Details

Please review the details of the payment you have entered and select **Confirm** to submit the payment for processing.

Verify Payment Details

Account Details

Account Number : 1434793
Email Address : test_user@test.com

Funding Source Details

Name on Account : test Account
Account Type : Checking
Routing Number : 063000047
Account Number : Checking - xxxxxx7890

Payment Details

Payment Date : 06/04/2018
Payment Amount : \$ 217.00

Additional Payment Details

Total Services Amount : \$ 217.00
Convenience Fee : \$ 0.00
Applicant Name : test user

By clicking **Confirm** to confirm your payment, you authorize us to initiate a debit from the **Payment Method Account** to make a payment to the **Account**, as detailed above. The payment to your account will be made on the **Payment Date** detailed above, and the debit from your account will occur within two business days of that date, but no earlier than that date. You also authorize your financial institution (and its successors or assigns), to process this debit to your account.

Additionally, by clicking confirm, you also agree to and accept the **Terms & Conditions** for usage of this site.

Review Paid/Final submissions

From the Review Paid/Final submissions link, you will find a list of all the submissions that you have submitted.

1. To review any submittal, click on the Review Paid/Final submissions hyper-link in the left-hand menu.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

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eAPPOINT

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Welcome to the Florida Department of Financial Services Producer Appointment System (eAppoint). Here, you can send appointment-related submissions to the Department. To begin, click **Start a new submittal**. To work on an existing submittal, click **Work on an in-progress submittal**. To review a submission already sent to the Department, click **Review Paid/Final submissions**. To activate your appointing entity account, click **Activate your Appointing Entity Account**.

Refund Policy for Preneed Sales Agent Appointment-Related Submission

The appointment fee is not subject to refund in accordance with section 469.466 (2)(h) F.S. and Rule 69K-5.003(6) F.A.C. If a duplicate appointment is processed, a refund may be requested in writing by the payer within 60 days of a duplicate appointment, the Division shall

2. To review any submittal, click on the "Type" hyper-link.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

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eAPPOINT

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Review Recent Submissions

Below is a list of all your submittals in the last 24 months. To review what the submittal contained, click on the submittal in the "Type" column.

WARNING: This website uses pop-up messages to inform you of important information and directions regarding your submittal to the Florida Department of Financial Services. You must disable or turn-off your pop-up blocker for this website if you are using such a feature within your web browser in order to view these important messages.

Page: GO! [Left Arrow] [Right Arrow]

Choose a submission to review

Appointing Entity	Type	Date Submitted	Submission ID
	PNRS Upload Function	5/16/2018 02:05:47 PM	000623964
	PNRS Upload Function	5/14/2018 02:06:16 PM	000623948

Return to Workbench

3. This screen will display the Review Recent Submissions where the submission status and payment status are shown. Click the "Review this Submittal" button.

The screenshot displays the eAPPOINT system interface for Jimmy Patronis, Florida's Chief Financial Officer. The header includes the state seal and navigation links: Home, Help, Contact Us, My Account, DFS Home, and Logout. The main content area is titled "Preneed Quarterly Remittance" and shows submission details: Submittal Type: PNRS Upload Function, Date Created: 5/16/2018 01:52:53 PM, and Submittal Name: Multiple AE upload file example. A table lists the submission with a status of "Complete" for both Submission Status and Payment Status. A red arrow points to the "Review this Submittal" button.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

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eAPPOINT

Preneed Quarterly Remittance

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Submittal Type: PNRS Upload Function
Date Created: 5/16/2018 01:52:53 PM
Submittal Name: Multiple AE upload file example

To review the current details of your submittal, click "Review this Submittal".

Component	Last Updated	Submission Status	Payment Status
Preneed Quarterly/Addendum Remittance	5/16/2018 01:53:35 PM	Complete	Complete

[Review this Submittal](#) [Return to Main Workbench](#)

4. In Review Recent Submissions screen, you will see the detail of the submittal. If multiple AE were uploaded on a single file, the detail for each AE reported will be shown.

JIMMY PATRONIS
 FLORIDA'S CHIEF FINANCIAL OFFICER

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Review Recent Submissions

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Payment Transaction Details	
Submission ID	000623964
Payment ID	1434617
Confirmation Number	12345678
Payment Status	Approved

Fee Type	Amount
PNRS Upload Function Fees	\$168.00
Processing Fee	\$8.40
Total Fees	\$176.40

Invoice Details	
Submitted By:	June Leverette
Date Submitted:	5/16/2018 02:05:47 PM

The following invoice(s) have been submitted:

Record Type	Invoice Number	AE # / Firm Name	Year/Quarter	Trust Fund Contracts	Insurance Funded Contracts	Cancelled Contracts	Fees (\$)
Addendum	Q42017-9209	115421 / [REDACTED]	2017/Q4	12	5	5	84.00
Previously Reported Count				0	0	0	
New Count				12	5	5	
Adjusted Count				12	5	5	
Comments: COMMENTS GO HERE							
Addendum	Q42017-9226	115438 / [REDACTED]	2017/Q4	9	4	1	84.00
Previously Reported Count				0	0	0	
New Count				9	4	1	
Adjusted Count				9	4	1	
Comments: COMMENTS GO HERE							

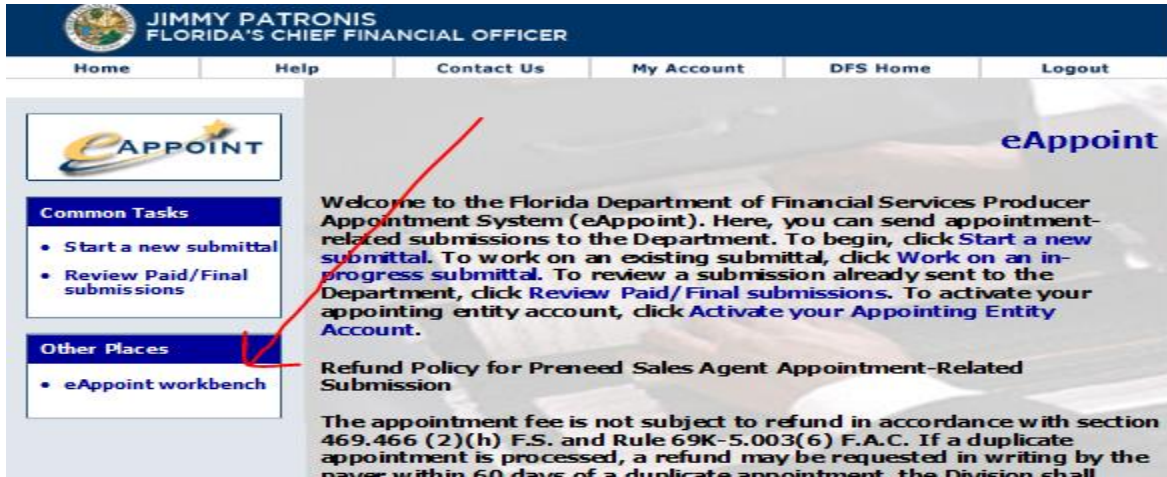
Return to Main Workbench
Print

Delete a Submittal

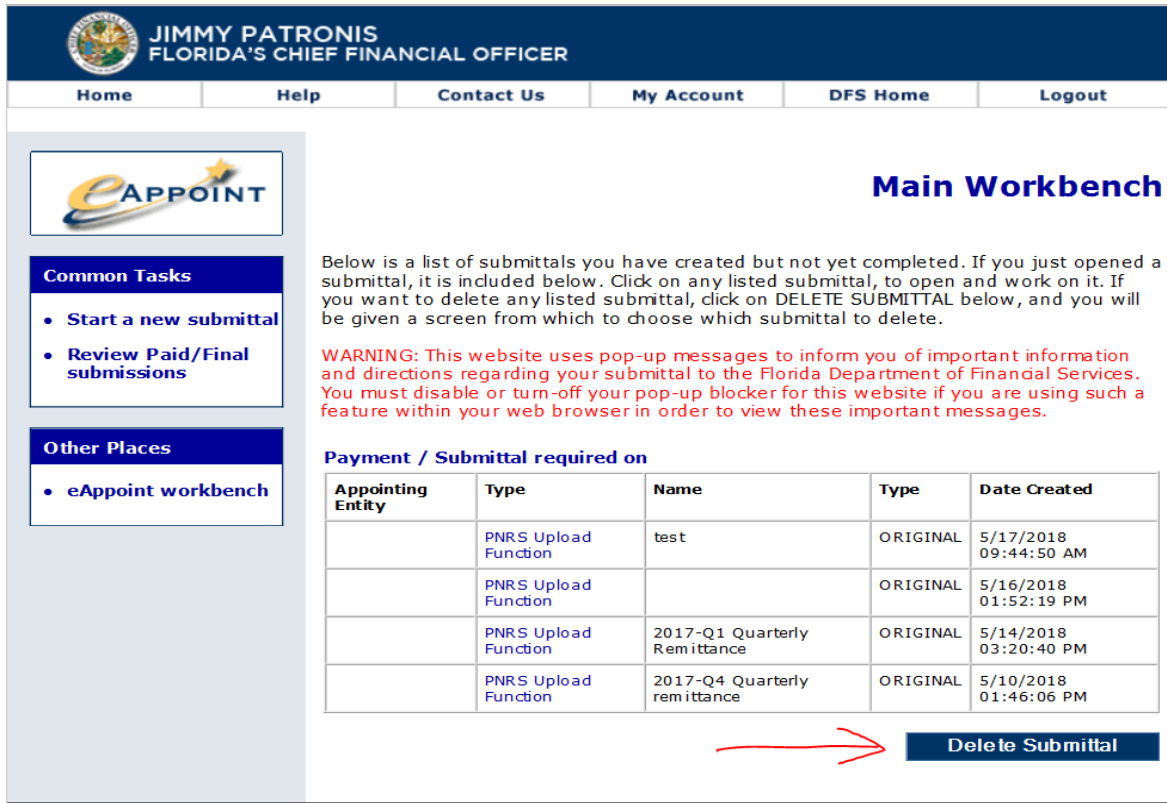
The system allows you to delete a submittal that has not yet been submitted. This may be needed if you start a new submittal and already have an existing submittal on the eAppoint Workbench or if you created a submittal in error.

The steps to delete a submittal are:

1. Log into the eAppoint system and click on the eAppoint workbench hyper-link located in the left-hand menu.



2. On the Main Workbench screen, click on the Delete Submittal button.



- On the Delete Submittal Workbench screen, you would select the submittal that you want to delete and then click the Delete Selected Submittal button.

JIMMY PATRONIS
 FLORIDA'S CHIEF FINANCIAL OFFICER

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Delete Submittal Workbench

To choose submittals to delete, click on the box adjacent to each submittal, then click on DELETE SELECTED SUBMITTAL. If you do not want to delete any submittals, click on CANCEL to return to your Main submittal Workbench.

WARNING: This website uses pop-up messages to inform you of important information and directions regarding your submittal to the Florida Department of Financial Services. You must disable or turn-off your pop-up blocker for this website if you are using such a feature within your web browser in order to view these important messages.

Payment / Submittal required on

Delete?	Appointing Entity	Type	Name	Type	Date Created
<input checked="" type="checkbox"/>		PNRS Upload Function	test	ORIGINAL	5/17/2018 09:44:50 AM
<input type="checkbox"/>		PNRS Upload Function		ORIGINAL	5/16/2018 01:52:19 PM
<input type="checkbox"/>		PNRS Upload Function	2017-Q1 Quarterly Remittance	ORIGINAL	5/14/2018 03:20:40 PM
<input type="checkbox"/>		PNRS Upload Function	2017-Q4 Quarterly remittance	ORIGINAL	5/10/2018 01:46:06 PM

Delete Selected Submittal
Cancel

Edit a Submittal Name

The system allows you to change a submittal name. This may happen because of a spelling mistake or maybe you have forgotten to enter the submittal name.

These are the steps to change a submittal name.

1. Log into the eAppoint system and then click on the eAppoint workbench hyper-link located in the left-hand menu.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

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eAPPOINT

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Welcome to the Florida Department of Financial Services Producer Appointment System (eAppoint). Here, you can send appointment-related submissions to the Department. To begin, click **Start a new submittal**. To work on an existing submittal, click **Work on an in-progress submittal**. To review a submission already sent to the Department, click **Review Paid/Final submissions**. To activate your appointing entity account, click **Activate your Appointing Entity Account**.

Refund Policy for Preneed Sales Agent Appointment-Related Submission

The appointment fee is not subject to refund in accordance with section 469.466 (2)(h) F.S. and Rule 69K-5.003(6) F.A.C. If a duplicate appointment is processed, a refund may be requested in writing by the payer within 60 days of a duplicate appointment. The Division shall

2. On the Main Workbench screen, click on the hyper-link associated with the submittal that you want to edit. In this example, the submittal name was empty so we will add a name.

JIMMY PATRONIS
FLORIDA'S CHIEF FINANCIAL OFFICER

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eAPPOINT

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

Main Workbench

Below is a list of submittals you have created but not yet completed. If you just opened a submittal, it is included below. Click on any listed submittal, to open and work on it. If you want to delete any listed submittal, click on DELETE SUBMITTAL below, and you will be given a screen from which to choose which submittal to delete.

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Payment / Submittal required on

Appointing Entity	Type	Name	Type	Date Created
	PNRS Upload Function	[REDACTED]	ORIGINAL	5/16/2018 01:52:19 PM
	PNRS Upload Function	2017-Q1 Quarterly Remittance	ORIGINAL	5/14/2018 03:20:40 PM
	PNRS Upload Function	2017-Q4 Quarterly remittance	ORIGINAL	5/10/2018 01:46:06 PM

Delete Submittal

- On the Preeed Quarterly Remittance screen, click the Edit Submittal Name button.

Preeed Quarterly Remittance

Submittal Type: PNRs Upload Function
 Date Created: 5/16/2018 01:52:19 PM
 Submittal Name: [Redacted]
Edit Submittal Name

Listed below are all the components required to submit this submittal. To view a component, click on its name. Your changes are automatically saved. To review the current details of your submittal, click "Review this Submittal".

Component	Last Updated	Submission Status	Payment Status
Preeed Quarterly/Addendum Remittance	5/16/2018 01:52:19 PM	Incomplete	Incomplete

Review this Submittal **Submit**

Return to Main Workbench

- On the Edit Submittal Details screen, enter the new submittal name and click the Done button.


Edit Submittal Details

Submittal Details
 Component List: PNRs Upload Function
 Date Created: 5/16/2018 01:52:19 PM


Please assign an optional name to this submittal. The name will help you identify your submittal while it is being assembled.

Submittal Name: **Done**

5. You will be returned to the Main Workbench where you can see the submittal name updated.

**JIMMY PATRONIS**
FLORIDA'S CHIEF FINANCIAL OFFICER

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Common Tasks

- [Start a new submittal](#)
- [Review Paid/Final submissions](#)

Other Places

- [eAppoint workbench](#)

Main Workbench

Below is a list of submittals you have created but not yet completed. If you just opened a submittal, it is included below. Click on any listed submittal, to open and work on it. If you want to delete any listed submittal, click on DELETE SUBMITTAL below, and you will be given a screen from which to choose which submittal to delete.

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Payment / Submittal required on

Appointing Entity	Type	Name	Type	Date Created
	PNRS Upload Function	Updated Submittal Name	ORIGINAL	5/16/2018 01:52:19 PM
	PNRS Upload Function	2017-Q1 Quarterly Remittance	ORIGINAL	5/14/2018 03:20:40 PM
	PNRS Upload Function	2017-Q4 Quarterly remittance	ORIGINAL	5/10/2018 01:46:06 PM

[Delete Submittal](#)