USER MANUAL

FOR

APPOINTING ENTITY USERS

FOR THE

PRENEED REMITTANCE SYSTEM (PNRS)
Table of Contents

Overview ........................................................................................................................................ 3
Home Page ...................................................................................................................................... 4
Permissions for Servicing Agent (SA) Account ............................................................................. 4
Common Task ................................................................................................................................ 10
  Start a New Submittal ..................................................................................................................... 10
  Review Paid/Final submissions ........................................................................................................ 10
Other Places .................................................................................................................................... 10
  eAppoint work bench ..................................................................................................................... 10
PNRS submittal types ...................................................................................................................... 10
  Preneed Quarterly Remittances ....................................................................................................... 10
    Remittance - Reporting Zero counts ............................................................................................ 15
    Remittance - When Credit is used ................................................................................................. 16
    Remittance - Payment Required .................................................................................................. 17
    Credit Card Payment ...................................................................................................................... 19
  eCheck Payment ............................................................................................................................... 22
  Mail in Payment ............................................................................................................................... 25
  Preneed Quarterly Remittance Addendums ..................................................................................... 29
    Addendum – Credit is Applied ....................................................................................................... 35
  Payment for Preneed Quarterly Remittance Citations ................................................................ 36
    Pay a Citation ................................................................................................................................. 36
    Dispute a Citation .......................................................................................................................... 41
  Addendums Required as Result of Financial Examination .......................................................... 44
    Examination – No Payment Required .......................................................................................... 48
    Examination – Payment Required ............................................................................................... 49
Delete a Submittal ........................................................................................................................... 50
Edit a Submittal Name .................................................................................................................... 52
Overview
This document is created to assist the Appointing Entity (AE) users when using the Financial Services Producer Appointment System (eAppoint). The eAppoint system has been enhanced so the Preneed Remittances can now be reported on-line and payments made electronically.

The eAppoint system was also enhanced so that Third-Party (TP) and Servicing Agent (SA) users can be given permission to report the Quarterly Preneed Remittance counts through the online web application on behalf of the AE.

The eAppoint system users can now report electronically their Quarterly Remittance, Addendums, and also Addendum that resulted from an Examination and make their payments electronically. Citations were added as well and can be paid electronically, but only by the AE and TP users.

The URL for the eAppoint web site is https://iportal.fldsfs.com/FCCS_eAPPOINT/ . This link is your access to the eAppoint system.

The words invoice and submittal will be used in the document below and can be confusing if you have not used the eAppoint system in the past. 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.
Home Page

The home page will be displayed to you once you have logged into your eAppoint account. There was a change made to the left-hand menu to give the user a visual on the screen so they know if they have pending submittals. You will find the counts for invoices where a submittal has not yet been started under the “Start a new submittal” link. Under the “eAppoint workbench” link, you will find the submittals that have been started but have not been submitted and paid.

Permissions for Servicing Agent (SA) Account

Before you can give permission to an SA user, the SA must have first set up their account in the eAppoint system. Once the account has been set up, the SA must provide you the email address that was used when setting up their account.
To give permission to an SA account you will need to follow these steps.

1. Log into the eAppoint system with your User Name and Password and click the Submit button.

2. Next click on the “My Account” option at the top of the screen.
3. Next you would click on the “Maintain third party/servicing agency accounts” from the left-hand menu.

4. On the Maintain Third Party/Servicing Agency Accounts page, if you have any third party or servicing agency accounts, they will be listed. The list will show the email address and the permission that have been assigned to that account.

   To add a new account, you would click on the Add button.
5. You would then enter the email address provided by the SA user and click the Next button.

6. If the email address you entered is not found in the system you will be provided a message and you would click the Back button to reenter the email address. If the email address was entered correctly based on what the SA provided you, you will need to contact the SA to get the correct email address.
7. When the email address that is entered is found, the screen will display that the account was found, you would click the Next button.

8. On the next screen, you will need to enter an Account Nickname.

**NOTE:** For Servicing Agent type users, the only permission that can be assigned is the “Report Quarterly Remittance Sales – Servicing Agent Only” option. Third Party account can be assigned any of the permission EXCEPT the “Report Quarterly Remittance Sales – Servicing Agent Only” option.
9. Once the permissions have been set and saved, the system will display the message that the account has been successfully added. Click the Done button to return to the list of accounts.

10. Once the account has been added, you will see the new account in your list.

11. At any time, you can change the permission for any of the accounts. You can either update their permissions or delete their permissions. To update the account, you would select the radio button associated with an account and select either “Modify” to change an account’s permission or click “Remove” button delete the user’s permissions completely.
12. Click the Home button to exit the “My Account” section of the eAppoint system.

**Common Task**
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**
This is the location in the eAppoint system where invoices that have been automatically generated by the Division will be found. The invoice types can be for the quarterly remittance, citation, or addendums that resulted from an examination.

**Review Paid/Final submissions**
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**
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 are not completed and could result in a citation for late reporting if not reported timely.

**PNRS submittal types**
The eAppoint system previously only had three submittal types that were all related to license appointments. The system has been updated to add the submittal types needed for reporting Preneed Remittance System (PNRS) quarterly counts and citation. Each type of new submittal is explained below.

**Preneed Quarterly Remittances**
The Division will be using email to notify you when it is time to report your quarterly remittance. You will report your quarterly remittance by creating a new submittal and select the invoice for the year and quarter that you want to report.

If you have a Servicing Agent (SA) that reports your counts on your behalf, **you do not need** to submit a quarterly count. When the SA submits that quarterly counts on your behalf, your invoice will automatically be closed so it does not display in your “Start a new submittal” count.
Below are the steps for creating and submitting a Preneed Quarterly Remittance.

1. Log into the eAppoint system and then click the “Start a new submittal”.

2. On the Start a New Submittal screen, click the next button.
3. On the Select Submittal Type screen, you would select the radio option associated with the Preneed Quarterly Remittance and click the Next Button.

4. On the Preneed Quarterly Remittance Invoice screen, you would select the radio option associated with the invoice for the year and quarter that you want to submit and click the Next button.

5. On the New Submittal Created screen, you will enter a Submittal Name and then click the Done button.
NOTE: It is going to help you if you enter a submittal name that is meaningful. This will help you when trying to find a certain submittal in the future.

6. From the Main Workbench screen, you would click on the hyper-link associated with the submittal that was just created.

7. On the Preneed Quarterly Remittance screen, you would click on the hyper-link to continue to the remittance page where you will enter your quarterly counts.
This screen is shown so you can change the submittal name which is discussed later in this document. It also displays the submission and the payment status.
Remittance - Reporting Zero counts  
8. On the Preneed Quarterly Remittance Invoice screen, if you are reporting zero counts for the quarter you can either click the box for reporting 0’s for the quarter or you can enter zeros in each of the required fields. Then click the submit button.  

NOTE: You MUST STILL click the Submit button even when you are reporting 0 counts.
Remittance - When Credit is used

9. On the Preneed Quarterly Remittance Invoice screen, enter the counts for each contract type in lines 1, 3, 4 and 5. The system will automatically calculate the amount that is owed.

**NOTE**: Keep in mind that if you have a credit you may owe $0.00 but you must click the Submit button to complete reporting your quarterly remittance.
Remittance - Payment Required

10. On the Preneed Quarterly Remittance Invoice screen, enter the counts for each contract type in lines 1, 3, 4 and 5. The system will automatically calculate the amount that is owed. The system will consider any credits that you may have and the credit will be applied reducing the amount that will need to be paid.

**NOTE:** If you click on the Return to Workbench button, your counts WILL NOT be saved, your submittal will still be in the eAppoint workbench where you will need to enter the counts again. To Save your counts if you have entered them and not ready to actually make your payment on line, you can click the Check Out and Pay fee and on the next page you can click the “Cancel” button to save the submittal with your counts to your eAppoint workbench area.

---

**Preneed Quarterly Remittance Invoice**

**DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS**

If not reported in full by 5:00 PM on AUGUST 30, 2018, the Department will assess a penalty to the listed preneed quarterly remittance invoice.

Invoice Number: Q22018-9427  
Quarter: Q2  
Year: 2018

Click here if there are no sales to report for this quarter: [ ]

1. Number of contracts assigned from other institutions: 0

2. Number of contracts entered into during Quarter 2; lines 3 + 4: 25

3. Number of Trust Fund contracts entered into during Quarter 2:

4. Number of Insurance Funded contracts entered into during Quarter 2:

5. Number of contracts cancelled within thirty days:

6. Total contracts written where remittance is due; lines (3 + 4) - 5: 22

7. Consumer Protection Trust Fund remittance due($1 per contract): $22.00

8. Regulatory Trust Fund remittance due($6 per contract): $132.00

9. Current total available credits: $21.00

10. Total Amount Due; lines (7 + 8) - 9: $133.00

11. Total available credit after submission: $0.00
11. If you select the **Check Out and Pay Fees options** on the quarterly remittance screen above, you will see this Payment Wizard page, click on the Next button.

12. The Payment Wizard process continues showing the total fee amount that needs to be paid. Click on the Next button to continue.
13. The next Payment Wizard page is the electronic signature page. Check the box and fill in the signature and phone number.

**NOTE:** Credit Card payments will be charged a service fee which is a % of the total amount owed. For eCheck payments there is no additional charge.

Credit Card Payment

14. For a **Credit Card Payment**, you will be taken to the bank website where you will need to fill out the credit card information for making the payment. To continue click on the Continue button. The screen will display the Convenience Fee that will be added to the payment.

**NOTE:** The email address that is entered on this screen will receive an email from the bank about the payment confirmation.
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. (1034)

Retrieved Account Details

Account Number: 1434785
Email Address: test_account2@gmail.com

Funding Source Details

Payment Method: Card Account
Name on Card: test user
Card Number: ************
Expiry Date: 12/16
Card CVV No: ***
Address Line 1: 123 Test Avenue
City: Tallahassee
State: Florida
Country: USA
Zip: 32301

Enter Payment Details

Payment Date: 06/06/2018
Payment Amount: Payment Amount Due ($602.00) This is Payment Amount Due

Enter Additional Payment Details

Total Services Amount: $ 602.00
Convenience Fee: $ 30.10

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

[Buttons: Cancel, Continue]
15. On the bank website Verify Payment Detail screen, you will be able to verify the account information and the payment amount. When you click on the Confirm button you will be return to the eAppoint system.
eCheck Payment

16. If you want to make eCheck payment, on the Payment Wizard page check the eCheck radio option and click the Next button.
17. On the bank web site, you will need to fill the account information.
18. 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.
Mail in Payment

19. If you select Mail in Payment on the Preneed Quarterly Remittance Invoice screen, you WILL need to Print out the invoice so the printed invoice can be mailed in with the check through the US Postal Service.

NOTE: You must have a printer so the invoice can be printed.
20. You will be displayed a system message about the additional charge that will be applied when you chose to mail in your payment. Click OK to continue.
21. The system will display a summary of the Quarterly Remittance where the additional $25 has been added. Click the Print Confirmation button so you can print out the invoice.

**NOTE:** A copy of this screen CANNOT be used when mailing in your payment.

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<table>
<thead>
<tr>
<th>Common Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Start a new submittal</td>
</tr>
<tr>
<td>- Review Paid/Final submissions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Places</th>
</tr>
</thead>
<tbody>
<tr>
<td>- eAppoint workbench (not current outstanding)</td>
</tr>
<tr>
<td>- Apply for a PSA License &amp; Initial Appointment</td>
</tr>
</tbody>
</table>

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### Preneed Quarterly Remittance Invoice

If not reported in full by 5:00 PM on AUGUST 30, 2018, the Department will assess a late fee citation to the listed preneed quarterly remittance invoice.

<table>
<thead>
<tr>
<th>Invoice Id:</th>
<th>Quarter: Q2</th>
<th>Year: 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>35807</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Number of contracts assigned from other institutions:** 2
- **Number of Trust Fund contracts entered into during Quarter 2:** 15
- **Number of Insurance Funded contracts entered into during Quarter 2:** 18
- **Number of contracts cancelled within thirty days:** 2
- **Total contracts written where remittance is due:** 31
- **Consumer Protection Trust Fund (RSC 319) remittance due ($1 per contract):** $31.00
- **Regulatory Trust Fund (RSC 330) remittance due ($6 per contract):** $186.00
- **Total Amount Due:** $217.00
22. A new Window will open that will allow you to Print the Quarterly Invoice.

**NOTE:** Be sure to print because this invoice MUST BE MAILED with your check so your payment can be applied properly to your account.
Preneed Quarterly Remittance Addendums

This submittal type will be used if you need to correct the counts that you have previously reported for a year and quarter. The addendum submittal screen will show you what has already been reported for that year and quarter so you can correct the counts accordingly. If you are adding more contracts sold to the quarter, the system will automatically calculate the amount that is due. If your reported contracts are reduced, once the submittal is submitted a credit will be applied to your account. If you have credit on your account, the credit will automatically be applied to your next quarterly remittance.

**NOTE:** When reporting your counts, you must report the new total counts for the quarter not just the count of the adjustment needed. For example, if you reported 10 trust funded contracts, 9 insurance funded contracts, and 0 cancelled contracts and realized that you needed to report 11 trust funded contracts you would start an addendum and enter 11 trust funded contracts, 9 insurance funded contracts, and 0 cancelled contracts. The system will reflect an adjustment of 1 contract and the amount owed for only this one contract.

These are the steps to create and submit a Preneed Quarterly Addendum.

1. Log into the eAppoint system and then click the “Start a new submittal”.

![eAppoint System Screenshot](image-url)
2. On the Start a New Submittal screen, click the Next button.

3. On the Select Submittal Type screen, select the radio option associated with the Preneed Quarterly Remittance Addendums and then click the Next button.

4. On the New Submittal Created screen, enter a submittal name, and click the Done button.
5. On the Main Workbench screen, click on the “Type” hyper-link associated with the submittal that you just created.

6. On the Preneed Quarterly Remittance Addendum screen, click on the Component hyper-link to continue with the addendum.
7. On the next Preneed Quarterly Remittance Addendum screen, you will need to enter the Year and Quarter and then click the Done button.

8. If you receive the message below, this indicates that you have not submitted for that year and quarter. The system will not allow you to enter an addendum if that year and quarter have not already been submitted.
Click on the OK button to close the message. You will need to check under the Start a new submittal for that year and quarter. If it’s not there then look under the eAppoint workbench to see if there is a pending submittal for that year and quarter that has not been submitted.

9. If you have selected the wrong year or quarter, select the correct year and quarter and click the Done button.

10. On the Preneed Quarterly Remittance Addendum Detail screen, the Year and Quarter for the remittance period are shown at the top of the screen. Below this information, the screen will display three columns, the reported, adjusted total counts and adjusted amounts.

a. The **Reported** column shows the total counts that have reported for that year and quarter prior.

b. The **Adjusted Total Counts** column is where you will enter the new counts that need to be reported. The Adjusted Total Count value that is entered should be the TOTAL COUNT of contracts for that quarter and year. See the NOTE above the value that should be entered in this column.

c. The **Adjusted Amounts** column shows the difference between the Reported and Adjusted Total Counts columns. This column shows how many contracts need to be submitted and paid.
At the bottom of this screen, the number of contracts that need to be submitted and the amount that is due are shown.

**NOTE:** If the amount that is due is $0.00 you must still need to submit the submittal by clicking on the Submit button.

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**Preneed Quarterly Remittance Addendum Detail**

If not reported in full by 5:00 pm on 30th of November, 2017, the Department will assess a penalty citation to the list of preneed quarterly remittance invoice.

**DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS**

All counts should be reported as absolute amounts for the quarter.

---

<table>
<thead>
<tr>
<th>Invoice Number</th>
<th>Quarter</th>
<th>Year</th>
<th>Reported Total</th>
<th>Adjusted Total</th>
<th>Adjusted Amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q32017-9427</td>
<td>Q3</td>
<td>2017</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1. Number of contracts assigned from other institutions</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Number of contracts entered into during Quarter 3; lines 3 + 4:</td>
<td>2</td>
<td>12</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Number of Trust Fund contracts entered into during Quarter 3:</td>
<td>0</td>
<td>10</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Number of Insurance Funded contracts entered into during Quarter 3:</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Number of contracts cancelled within thirty days:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Total contracts written where remittance is due; lines (3 + 4) - 5:</td>
<td>2</td>
<td>12</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Consumer Protection Trust Fund remittance due ($1 per contract):</td>
<td></td>
<td></td>
<td>$10.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Regulatory Trust Fund remittance due ($6 per contract):</td>
<td></td>
<td></td>
<td>$60.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Current total available credits:</td>
<td></td>
<td></td>
<td>$21.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Total Amount Due; lines (7 + 8) - 9:</td>
<td></td>
<td></td>
<td>$49.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Total available credit after submission:</td>
<td></td>
<td></td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** A comment is required when submitting an addendum.
11. You will now select your payment method. Help with the payment screens can be found in the Preneed Quarterly Remittance section above.

Addendum – Credit is Applied

1. Below is another example where the AE made adjustments to the contracts count which resulted in a credit that will be applied to the AE’s account.

**NOTE:** You must still submit the submittal to report the adjustments and the credit to be added to your account.

**NOTE:** If you do not see the Submit button, this is an indicator that you have not entered a count in lines 1, 3, 4 or 5. A count must be entered for all these line.
Payment for Preneed Quarterly Remittance Citations
This submittal type is when a Citation has been issued to the AE because of late reporting. The user can either pay the citation or dispute the citation.

**NOTE**: A citation can only be disputed within 30 days after the citation is received. If a citation is not disputed within the allowed period, the AE is then required to pay the citation.

Pay a Citation
These are the steps to pay a citation that has been issued.

1. Log into the eAppoint system and then click the “Start a new submittal”.

![eAppoint System](image-url)
2. Click on the Next button on the Start a New Submittal page.

3. On the Select Submittal Type page, select the Payment for Preneed Quarterly Remittance Citations option and click the next button.

4. On the Citation Invoice for Preneed Quarterly Remittance screen, you will select the radio option for the citation that you want to pay, then click the Next button.
5. On the New Submittal Created screen, you should enter the submittal name and click the Done button.

6. On the Main Workbench page, you should then see the new submittal that you just created. Your submittal name is shown under the Name column. Click on the “Type” hyper-link to continue with the payment.
7. On the Citation Invoice for Preneed Quarterly Remittance you will be able to see the submittal and payment status. Click on the Component hyper-link to open the submittal.

8. On the Citation Invoice for Preneed Quarterly Remittance screen, the year and quarter the citation was issued against and the amount that is due is displayed on the screen. Select your payment method and click on that button.
9. Help with different payment options can be found above in the Preneed Quarterly Remittance section of this document.
Dispute a Citation
These are the steps to dispute a citation electronically.

1. Log into the eAppoint system and then click the “Start a new submittal”.

2. On the Start a New Submittal screen, just click on the Next button.
3. On the Select Submittal Type screen, select the option for Payment for Preneed Quarterly Remittance Citations and click the Next button.

4. On the Citation Invoice for Preneed Quarterly Remittance, select the radio option that is associated with the quarter and year for the citation that you want to dispute, then click the Dispute button.
5. On the Citation Dispute screen, you will need to enter the reason you are disputing the citation, then click the Done button.

6. Click on the Done button on the next page and it will return you to home page in eAppoint.
Addendums Required as Result of Financial Examination

This submittal invoice type is created when a financial examination is made by the Division of Funeral, Cemetery and Consumer Services where the contract counts for a year and quarter are found to have not been reported correctly. An examination invoice will have fixed contract counts displayed on the invoice and the AE will not be able to change the contract counts. The AE must pay the amount shown on this invoice.

NOTE: The AE should create a submittal and submit the financial examination as explained below so the findings are reported back to the Division.

NOTE: The system will prevent the AE from entering an addendum if there is a pending financial examination that has not been paid for that year that an addendum is trying to be entered.

Here are the steps for submitting an addendum as a result of a financial examination.

1. Log into the eAppoint system and click on the Start a new submittal.
2. On the Select Submittal Type screen, select the radio option associated with the Addendums required as result of financial examination and then click the next button.

3. On the Addendums required as result of financial examination screen, you will select the radio option associated with the examination year and quarter that you want to submit and then click the Next button.

4. On the New Submittal Created screen, you need to enter a submittal name and then click the Done button.
5. From the Main Workbench screen, you will then select the hyper-link associated with the submittal that you just created.

6. On the Addendums required as result of financial examination screen, click on the Component hyper-link to open the submittal.
7. On the Addendums required as result of financial examination screen, the Year and Quarter for the examination period are shown at the top of the screen and then three columns displaying the reported, adjusted total counts and adjusted amounts.

   a. The **Reported** column shows the total counts that have reported for that year and quarter prior.

   b. The **Adjusted Total Counts** column will display the financial examination findings.

   c. The **Adjusted Amounts** column shows the difference between the Reported and Adjusted Total Counts columns. This column shows how many contracts need to be submitted and paid.

At the bottom of this screen, the number of contracts that need to be submitted and the amount that is due are shown.
Examination – No Payment Required

8. This screen displays an examination addendum where no payment is required because the AE has a credit for more than what the amount owed.

**NOTE:** If the amount that is due is $0.00 you must still need to submit the submittal by clicking on the Submit button.
Examination – Payment Required

9. Below is another example where the AE needs to submit and make a payment. The AE has a credit but their credit does not cover the total amount that is due.

Select your payment method. If you need help with the payment screens you can review the process in the Preneed Quarterly Remittance in the document above.
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 you find that you already have an existing submittal started.

The steps to delete a submittal are:

1. Once you are logged into the eAppoint system 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.
3. On the Delete Submittal Workbench screen, you would select the submittal that you want to delete and then click the Delete Selected Submittal button.

4. The system will refresh your Main Workbench list where the deleted submittal will no longer be displayed.
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. Once you are logged into the eAppoint system click on the eAppoint workbench hyper-link located in the left-hand menu.

2. On the Main Workbench screen, click on the hyper-link associated with the submittal that you want to edit the name. In this example, the submittal name was not entered.
3. On the Preneed Quarterly Remittance Addendum screen, click the Edit Submittal Name button.

4. On the Edit Submittal Details screen, enter the new submittal name and click the Done button.
5. You will be returned to the Main Workbench where you can see the submittal name has been updated.