



Department of Financial Services

USER MANUAL

FOR

APPOINTING ENTITY USERS

FOR THE

PRENEED REMITTANCE SYSTEM (PNRS)

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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.fldfs.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.

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eAPPOINT

Common Tasks

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

Other Places

- [eAppoint workbench](#)
(2 - current outstanding)
- [Apply for a PSA License & Initial Appointment](#)

Welcome to the Florida Department of Financial Services Producer Appointment System (eAppoint). Here, you will create and send submissions to the Department. To begin, click [Start a new submittal](#). To work on an existing submittal, click [eAppoint workbench](#). To review submissions already sent to the Department, click [Review Paid/Final submissions](#).

Refund Policy for Premeed 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 refund the payer 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) 413-3030, mail or fax.

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.

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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:

Passw ord:

Submit

Common Tasks

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

2. Next click on the "My Account" option at the top of the screen.

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eAPPOINT

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, dick 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, dick Review Paid/Final submissions. To activate your appointing entity account, dick 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 refund the payer 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.

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench

- Next you would click on the "Maintain third party/servicing agency accounts" from the left-hand menu.

- 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.

Third Party/Servicing Agency Email	Nickname	Permissions Allowed
<input type="radio"/> june.leverette@my.com (June Leverette)	June Testing	<ul style="list-style-type: none"> Preneed Quarterly Remittance - SA Only

5. You would then enter the email address provided by the SA user and click the Next button.

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eAPPOINT

Account Tasks

- View your account
- Maintain third party/ servicing agency accounts
- Address maintenance
- Phone maintenance

Add Third Party/ Servicing Agency Account

Enter the email address of an I-Portal account you would like to add as an authorized user. This account will be able to create and submit filings on your behalf. Click "Next" to continue.

E-Mail address of I-Portal account to add:

[Create a Third Party Account](#)

Cancel Next

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.

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eAPPOINT

Account Tasks

- View your account
- Maintain third party/ servicing agency accounts
- Address maintenance
- Phone maintenance

Add Third Party/ Servicing Agency Account

The account **test@fldfs.com** was not found. Click "Back" to search for another account.

Cancel Back

- When the email address that is entered is found, the screen will display that the account was found, you would click the Next button.

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eAPPOINT

Add Third Party/Service Agency Account

The account **uat_testing@gmail.com** (uat testing) was found.
Click "Next" to continue, or click "Back" to choose a different account.

Cancel Back **Next**

(Red arrow points to the 'Next' button)

Account Tasks

- View your account
- Maintain third party/service agency accounts
- Address maintenance
- Phone maintenance

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

NOTE: For Service Agent type users, the only permission that can be assigned is the "Report Quarterly Remittance Sales – Service Agent Only" option. Third Party account can be assigned any of the permission EXCEPT the "Report Quarterly Remittance Sales – Service Agent Only" option.

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eAPPOINT

Add Third Party/Service Agency Account

Select the permissions you wish this account to have. For each permission you select, the account will be able to create and submit filings. You may optionally provide a nickname for this account. Click "Save" to authorize this account for the selected permissions.

Email Address: uat_testing@gmail.com
* Account Nickname:

* Permissions:

- Create New Appointments filings
- Create Appointment Renewals filings
- Create Appointment Terminations filings
- Apply for a PSA License & Initial Appointment
- Report Preneed Quarterly Remittance
- Report Preneed Quarterly Remittance Addendums
- Payment for Preneed Quarterly Remittance Citations
- Report Preneed Quarterly Remittance Examination
- Report Quarterly Remittance Sales - Service Agent Only

Cancel **Save**

(Red arrow points to the 'Save' button)

Account Tasks

- View your account
- Maintain third party/service agency accounts
- Address maintenance
- Phone maintenance

- 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.

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eAPPOINT

Add Third Party/Servicing Agency Account

The account has been successfully added as a third party/servicing agency.

Done

Account Tasks

- View your account
- Maintain third party/servicing agency accounts
- Address maintenance
- Phone maintenance

- Once the account has been added, you will see the new account in your list.
- At any time, you change the permission to 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 to "Modify" to change an account's permission or click "Remove" button delete the user's permissions completely.

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eAPPOINT

Maintain Third Party/Servicing Agency Accounts

The following accounts are allowed to create and submit filings on your behalf. To add an account as an authorized third party/servicing agency, click "Add". To change an account, select an account and click "Modify." To remove an account as an authorized third party/servicing agency, select an account and click "Remove".

	Third Party/Servicing Agency Email	Nickname	Permissions Allowed
<input type="radio"/>	june.leverette@[REDACTED] (June Leverette)	June Testing	• Preneed Quarterly Remittance - SA Only
<input type="radio"/>	uat_testing@gmail.com (uat testing)	John Doe	• Preneed Quarterly Remittance - SA Only

Cancel Add Modify Remove

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".

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eAPPOINT

Common Tasks

- Start a new submittal (7 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench (4 - current outstanding)
- Apply for a PSA License & Initial Appointment

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 refund the payer 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.

2. On the Start a New Submittal screen, click the next button.

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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 radio option associated with the Preneed Quarterly Remittance and click the Next Button.

- 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.

	Invoice Date	Quarter	Year	Invoice Number	Invoice Due Date
<input type="radio"/>	04/01/2018	Q1	2018	Q12018-9456	05/31/2018
<input checked="" type="radio"/>	01/01/2018	Q4	2017	Q42017-9456	03/02/2018

- 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.


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.


Type	Name	Type	Date Created
Preneed Quarterly Remittance	2017_Q4_Quarterly Remittance	ORIGINAL	6/1/2018 03:16:50 PM
Preneed Quarterly Remittance Addendums	2017_Q4_Addendu	ORIGINAL	6/1/2018 12:08:17 PM
Preneed Quarterly Remittance Addendums	Updated Submittal Name	ORIGINAL	6/1/2018 12:06:55 PM
New Appointments	Jeff Haney	ORIGINAL	8/2/2007 12:53:35 PM
New Appointments		ORIGINAL	2/14/2006 01:45:28 PM

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.

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Preneed Quarterly Remittance

Submittal Type: Preneed Quarterly Remittance
Date Created: 6/1/2018 03:16:50 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 Remittance	6/1/2018 03:16:50 PM	Incomplete	Incomplete

[Return to Main Workbench](#)

Remittance - Reporting Zero counts

- 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.

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Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench
(3 - current outstanding)
- Apply for a PSA License & Initial Appointment

Appointing Entity Info

- THE FRALIN GROUP INC (115639)

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:	<input type="text" value="0"/>	
2. Number of contracts entered into during Quarter 2; lines 3 + 4:	<input type="text" value="0"/>	
3. Number of Trust Fund contracts entered into during Quarter 2:	<input type="text" value="0"/>	
4. Number of Insurance Funded contracts entered into during Quarter 2:	<input type="text" value="0"/>	
5. Number of contracts cancelled within thirty days:	<input type="text" value="0"/>	
6. Total contracts written where remittance is due; lines (3 + 4) - 5:		0
7. Consumer Protection Trust Fund remittance due(\$1 per contract):	\$	0.00
8. Regulatory Trust Fund remittance due(\$6 per contract):	\$	0.00
9. Current total available credits:	\$	0.00
10. Total Amount Due; lines (7 + 8) - 9:	\$	0.00
11. Total available credit after submission:	\$	0.00

Return to Workbench
Submit

Remittance - When Credit is used

- On the Preeed 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.

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Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench (3 - current outstanding)
- Apply for a PSA License & Initial Appointment

Preeed 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:	<input type="text" value="0"/>
2. Number of contracts entered into during Quarter 2; lines 3 + 4:	<input type="text" value="45"/>
3. Number of Trust Fund contracts entered into during Quarter 2:	<input type="text" value="15"/>
4. Number of Insurance Funded contracts entered into during Quarter 2:	<input type="text" value="30"/>
5. Number of contracts cancelled within thirty days:	<input type="text" value="5"/>

6. Total contracts written where remittance is due; lines (3 + 4) - 5:	40
7. Consumer Protection Trust Fund remittance due(\$1 per contract):	\$ 40.00
8. Regulatory Trust Fund remittance due(\$6 per contract):	\$ 240.00
9. Current total available credits:	\$ 2,000.00
10. Total Amount Due; lines (7 + 8) - 9:	0.00
11. Total available credit after submission:	\$ 1,720.00

Return to Workbench
Submit

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 actual 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.

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eAPPOINT

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench (3 - current outstanding)
- Apply for a PSA License & Initial Appointment

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:	15
4. Number of Insurance Funded contracts entered into during Quarter 2:	10
5. Number of contracts cancelled within thirty days:	3
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

Return to Workbench
Check Out and Pay Fees
Mail In Payment

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.

The screenshot shows the 'Payment Wizard' interface. At the top, it identifies Jimmy Patronis as Florida's Chief Financial Officer. A navigation bar includes links for Home, Help, Contact Us, My Account, DFS Home, and Logout. On the left, there are sections for 'Common Tasks' (Start a new submittal, Review Paid/Final submissions) and 'Other Places' (eAppoint workbench, Apply for a PSA License & Initial Appointment). The main content area explains that Bank Of America is the vendor for online payments and provides instructions on using the CANCEL button. At the bottom right, there are 'Cancel' and 'Next' buttons, with a red arrow pointing to 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.

This screenshot shows the 'Payment Wizard' page displaying a table of fees. The table lists 'Preneed Quarterly Remittance Fees' for \$3,115.00 and a 'Credit - Adjustment Amount' of -\$2,513.00. The 'Total Fees' are highlighted in yellow and amount to \$602.00. Below the table are 'Cancel' and 'Next' buttons, with a red arrow pointing to the 'Next' button.

Fee Type	Amount
Preneed Quarterly Remittance Fees	\$3,115.00
Credit - Adjustment Amount	-\$2,513.00
Total Fees	\$602.00

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.

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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: test user

Business Phone: 850-222-2222

Payment Method: Credit Card eCheck

Cancel Next

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.(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* : *****
Card Type :
Expiry 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 : [REDACTED]

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

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.



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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 : 1434825
Email Address : test.test@gmail.com

Funding Source Details

Name on Card : test account
Card Number : xxxxxxxxxxxx5454
Expiry Date : 12/18
Address Line 1 : 123 testing drive
Address Line 2 :
City : tallahassee
State : FL
Country : United States of America
Zip : 32301

Payment Details

Payment Date : 08/08/2018
Payment Amount : \$ 632.10

Additional Payment Details


Total Services Amount : \$ 602.00
Convenience Fee : \$ 30.10
Applicant Name : ██████████

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.

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.

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Payment Wizard

Common Tasks

- **Start a new submittal** (5 - current outstanding)
- **Review Paid/Final submissions**

Other Places


- **eAppoint workbench** (5 - current outstanding)
- **Apply for a PSA License & Initial Appointment**

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



17. On the bank web site, you will need to fill the account information.

A A A



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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 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



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.



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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](#).

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.

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Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench (3 - current outstanding)
- Apply for a PSA License & Initial Appointment

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:	2	
2. Number of contracts entered into during Quarter 2; lines 3 + 4:	33	
3. Number of Trust Fund contracts entered into during Quarter 2:	15	
4. Number of Insurance Funded contracts entered into during Quarter 2:	18	
5. Number of contracts cancelled within thirty days:	2	
6. Total contracts written where remittance is due; lines (3 + 4) - 5:	31	
7. Consumer Protection Trust Fund remittance due(\$1 per contract):	\$	31.00
8. Regulatory Trust Fund remittance due(\$6 per contract):	\$	186.00
9. Current total available credits:	\$	21.00
10. Total Amount Due; lines (7 + 8) - 9:	\$	196.00
11. Total available credit after submission:	\$	0.00

Return to Workbench


Check Out and Pay Fees

Mail In Payment

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.

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Preneed Quarterly Remittance Invoice

DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS

If not reported in full by 5:00 PM on MAY 31, 2018, the Department will assess a penalty to the listed preneed quarterly remittance invoice.

Invoice Number: Q12018-9456 **Quarter:** Q1 **Year:** 2018

Click here if

1. Number

2. Number lines 3

3. Nu
yea

4. Nu
cal

5. Number

6. Total lines (

7. Consum
contrac

8. Regulat


9. Current

10. Total

11. Total available credit after submission: \$ 0.00

Return to WorkbenchCheck Out and Pay FeesMail In Payment

Message from webpage



You have selected to print a paper copy of your preneed quarterly remittance and mail it to the Division of Funeral & Cemetery Service.

If you click OK you will no longer have the option to pay your preneed quarterly remittance electronically AND an additional 'Paper Processing Fee' of \$25.00 per quarter and per licensee will be added to the cost of your preneed quarterly remittance.


The printed preneed quarterly remittance invoice will have the address and instructions on how to complete your preneed quarterly remittance. To continue with this action click OK.

If you would like to pay online, please click CANCEL below and return to the 'preneed quarterly remittance invoice' screen and select 'Check Out and Pay Fees' to continue your preneed quarterly remittance.


OKCancel

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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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.

Invoice Id: 35807 **Quarter:** Q2 **Year:** 2018

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

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

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.

The screenshot shows the eAPPOINT web application interface. The main window displays a 'Preneed Quarterly Remittance Receipt' for Invoice Id: 35807. The receipt lists various contract metrics and remittance amounts. A secondary window titled 'eAppoint - Preneed Quarterly Remittance - Internet Explorer' is overlaid on top, showing the receipt details and a 'Print' button.

Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench (3 - current outstanding)
- Apply for a PSA License & Initial Appointment

Preneed Quarterly Remittance Receipt

If not reported in full by the due date, a late fee citation to the filer will be issued.

Invoice Id: 35807

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

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

Invoice Total Amount Due(\$): \$217.00

To remit preneed quarterly invoice, mail a copy of this completed preneed quarterly invoice with your check or money order payable to:

Department of Financial Services
Attn: Revenue Processing Section
P.O. Box 6100
Tallahassee, Florida 32314-6100

Close Window Print

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”.

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eAPPOINT

Common Tasks

- Start a new submittal (5 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench (2 - current outstanding)
- Apply for a PSA License & Initial Appointment

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 refund the payer 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.

2. On the Start a New Submittal screen, click the Next button.

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**

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

Select Submittal Type


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

Select type of submittal

- New Appointments
- Renew Appointments
- Terminate Appointments
- Preneed Quarterly Remittance (2 - current outstanding)
- Preneed Quarterly Remittance Addendums
- Payment for Preneed Quarterly Remittance Citations (4 - current outstanding)
- Addendums required as result of financial examination

Cancel **Back** **Next**

4. On the New Submittal Created screen, enter a submittal name, and click the Done button.



Common Tasks

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

Other Places

- [eAppoint workbench](#)
(4 - current outstanding)
- [Apply for a PSA License & Initial Appointment](#)

New Submittal Created

A new submittal has been started, as indicated below.

Submittal Type: Preneed Quarterly Remittance Addendums
Date Created: 6/1/2018 12:08:17 PM


You can give this submittal a name in the block below. Naming the submittal is optional. Most Preneed 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](#)



- On the Main Workbench screen, click on the "Type" hyper-link associated with the submittal that you just created.



Common Tasks

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

Other Places

- [eAppoint workbench](#)
(4 - current outstanding)
- [Apply for a PSA License & Initial Appointment](#)

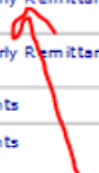
Main Workbench

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.


Payment / Submittal required on

Type	Name	Type	Date Created
Preneed Quarterly Remittance Addendums	2017_Q4_Addendum	ORIGINAL	6/1/2018 12:08:17 PM
Preneed Quarterly Remittance Addendums		ORIGINAL	6/1/2018 12:06:55 PM
New Appointments	Jeff Haney	ORIGINAL	8/2/2007 12:53:35 PM
New Appointments		ORIGINAL	2/14/2006 01:45:28 PM



[Delete Submittal](#)

- On the Preneed Quarterly Remittance Addendum screen, click on the Component hyper-link to continue with the addendum.



Common Tasks

- Start a new submittal (6 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench (4 - current outstanding)
- Apply for a PSA License & Initial Appointment

Preneed Quarterly Remittance Addendum

Submittal Type: Preneed Quarterly Remittance Addendums
 Date Created: 6/1/2018 12:08:17 PM
 Submittal Name: 2017_Q4_Addendum


[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 Remittance Addendums	6/1/2018 12:08:17 PM	Incomplete	Incomplete

[Return to Main Workbench](#)

- On the next Preneed Quarterly Remittance Addendum screen, you will need to enter the Year and Quarter and then click the Done button.

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Preneed Quarterly Remittance Addendums

Please enter the Year and Quarter that you would like to Adjust. Click "Next" to continue.

Year : Quarter:

[Back](#) [Done](#)

- 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.

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Preneed Quarterly Remittance Addendums

Please enter the Year and Quarter that you would like to Adjust. Click "Done" to continue.

Year : 2018 Quarter: Q2

Back Done

Message from webpage

There is no reported invoice at all for that year and quarter

OK

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.



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

- Other Places**
- eAppoint workbench (3 - current outstanding)
 - Apply for a PSA License & Initial Appointment

Preneed Quarterly Remittance Addendum Detail

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

DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS
All counts should be reported as absolute amounts for the quarter.

Invoice Number : Q32017-9427 Quarter : Q3 Year: 2017

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

Note:
A comment is required when submitting an addendum.

You will need to enter the reason for the adjustment here.

Check Out and Pay Fees

Mail In Payment

Return to Workbench

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.

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Preneed Quarterly Remittance Addendum Detail

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

DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS

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

Invoice Number : Q32017-9427
Quarter : Q3
Year: 2017

	Reported	Adjusted Total Counts	Adjusted Amounts
1. Number of contracts assigned from other institutions:	0	0	0
2. Number of contracts entered into during Quarter 3; lines 3 + 4:	2	0	-2
3. Number of Trust Fund contracts entered into during Quarter 3:	0	0	0
4. Number of Insurance Funded contracts entered into during Quarter 3:	2	0	-2
5. Number of contracts cancelled within thirty days:	0	0	0
6. Total contracts written where remittance is due; lines (3 + 4) - 5:	2	0	-2
7. Consumer Protection Trust Fund remittance due (\$1 per contract):			\$2.00
8. Regulatory Trust Fund remittance due (\$6 per contract):			\$12.00
9. Current total available credits:			\$21.00
10. Total Amount Due; lines (7 + 8) - 9:			\$0.00
11. Total available credit after submission:			\$35.00

Note:
A comment is required when submitting an addendum.

You will need to enter the reason for the adjustment here.

Submit

Return to Workbench

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".

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eAPPOINT

Common Tasks

- Start a new submittal (1 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench
- Apply for a PSA License & Initial Appointment

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 refund the payer 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.

- Click on the Next button on the Start a New Submittal page.

The screenshot shows the top navigation bar with the Florida Department of Financial Services logo and the name 'JIMMY PATRONIS, FLORIDA'S CHIEF FINANCIAL OFFICER'. Below the navigation bar are links for Home, Help, Contact Us, My Account, DFS Home, and Logout. The main content area is titled 'Start a New Submittal' and includes a 'Welcome to the eAppoint Wizard' section. A sidebar on the left contains 'Common Tasks' (Start a new submittal, Review Paid/Final submissions) and 'Other Places' (eAppoint workbench, Apply for a PSA License & Initial Appointment). The main text explains the submittal types and includes a warning about pop-up messages. At the bottom right, there are 'Cancel' and 'Next' buttons, with a red arrow pointing to the 'Next' button.

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

The screenshot shows the 'Select Submittal Type' page. The top navigation bar and sidebar are identical to the previous page. The main content area is titled 'Select Submittal Type' and includes a 'Select type of submittal' section with a list of radio button options: New Appointments, Renew Appointments, Terminate Appointments, Preneed Quarterly Remittance, Preneed Quarterly Remittance Addendums, Payment for Preneed Quarterly Remittance Citations (1 - current outstanding), and Addendums required as result of financial examination. The 'Payment for Preneed Quarterly Remittance Citations' option is highlighted in yellow. At the bottom right, there are 'Cancel', 'Back', and 'Next' buttons, with a red arrow pointing to the 'Next' button.

- 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.

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Citation Invoice for Preeed Quarterly Remittance

Select a Citation Invoice for Preeed Quarterly Remittance. Click "Next" to continue.

Select a Citation Invoice for Preeed Quarterly Remittance

	Invoice Date	Quarter	Year	Invoice Number	Invoice Due Date	Type
<input checked="" type="radio"/>	05/31/2018	Q4	2017	Q42017-8686	08/06/2018	Late Addendum
<input type="radio"/>	06/01/2018	Q2	2017	Q22017-8686	08/07/2018	Examination

Dispute Cancel Back **Next**



- On the New Submittal Created screen, you should enter the submittal name and click the Done button.

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New Submittal Created


A new submittal has been started, as indicated below.

Submittal Type: Payment for Preeed Quarterly Remittance Citations
Date Created: 5/31/2018 02:42:54 PM


You can give this submittal a name in the block below. Naming the submittal is optional. Most Preeeed 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, dick on the HELP tab above.

Submittal Name:

Done



- 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.



Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench (1 - current outstanding)
- Apply for a PSA License & Initial Appointment

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.

Payment / Submittal required on

Type	Name	Type	Date Created
Payment for Preneed Quarterly Remittance Citations	2017_Q4_Citation	ORIGINAL	5/31/2018 02:42:54 PM

[Delete Submittal](#)

- 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.



Common Tasks

- Start a new submittal
- Review Paid/Final submissions

Other Places

- eAppoint workbench (1 - current outstanding)
- Apply for a PSA License & Initial Appointment

Citation Invoice for Preneed Quarterly Remittance

Submittal Type: Payment for Preneed Quarterly Remittance Citations
Date Created: 5/31/2018 02:42:54 PM
Submittal Name: 2017_Q4_Citation

[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
Payment for Preneed Quarterly Remittance Citations	5/31/2018 02:42:54 PM	Incomplete	Incomplete

[Return to Main Workbench](#)

- 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.



Common Tasks

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

Other Places

- [eAppoint workbench](#)
(1 - current outstanding)
- [Apply for a PSA License & Initial Appointment](#)

Citation Invoice for Preneed Quarterly Remittance

If not reported in full by 5:00 PM on JULY 15, 2018, the Department will assess a late fee to the listed Citation Invoice for Preneed Quarterly Remittance.

Invoice Number: Q42017-9209

Quarter: Q4

Year: 2017

Total Amount Due:

\$200

[Return to Workbench](#)

[Check Out and Pay Fees](#)

[Mail In Payment](#)



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".

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eAPPOINT

Common Tasks

- Start a new submittal (1 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench
- Apply for a PSA License & Initial Appointment

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 refund the payer 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.

2. On the Start a New Submittal screen, just click on the Next button.

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eAPPOINT

Common Tasks

- Start a new submittal (8 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench (3 - current outstanding)
- Apply for a PSA License & Initial Appointment

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, select the option for Payment for Preneed Quarterly Remittance Citations and click the Next button.

- 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.

	Invoice Date	Quarter	Year	Invoice Number	Invoice Due Date	Type
<input checked="" type="radio"/>	05/15/2018	Q3	2017	Q32017-9425	07/14/2018	Late Addendum

- On the Citation Dispute screen, you will need to enter the reason you are disputing the citation, then click the Done button.

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eAPPOINT

Citation Dispute

Please enter the reason that you are disputing this citation. You have up to 500 characters to explain.

Dispute Note: you will need to enter the reason that you are disputing the citation here.

Cancel Done

- Click on the Done button on the next page and it will return you to home page in eAppoint.

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eAPPOINT

Citation Dispute

- Your Citation dispute has been submitted successfully.

Done

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.

The screenshot shows the eAppoint system interface. At the top, there is a dark blue header with the Florida state seal and the text "JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER". Below the header is a navigation bar with links for Home, Help, Contact Us, My Account, DFS Home, and Logout. The main content area is titled "Start a New Submittal" in large blue text. On the left, there is a sidebar with a logo for "eAPPOINT" and two sections: "Common Tasks" and "Other Places". The "Common Tasks" section has a red checkmark next to the "Start a new submittal (8 - current outstanding)" link. The "Other Places" section has links for "eAppoint workbench (3 - current outstanding)" and "Apply for a PSA License & Initial Appointment". The main content area is titled "Welcome to the eAppoint Wizard" and contains a paragraph of text explaining the submittal process. Below the text is a red warning message: "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." At the bottom right, there are two buttons: "Cancel" and "Next", with a red checkmark next to the "Next" button. Below the "Next" button, there is a red arrow pointing to the "Next" button.

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eAPPOINT

Start a New Submittal

Common Tasks

- **Start a new submittal**
(8 - current outstanding)
- **Review Paid/Final submissions**

Other Places

- **eAppoint workbench**
(3 - current outstanding)
- **Apply for a PSA License & Initial Appointment**

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.

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Click "Next" to continue.

Cancel Next

- 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.

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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

- New Appointments
- Renew Appointments
- Terminate Appointments
- Preneed Quarterly Remittance
- Preneed Quarterly Remittance Addendums
- Payment for Preneed Quarterly Remittance Citations (2 - current outstanding)
- Addendums required as result of financial examination (1 - current outstanding)**

Cancel Back Next

- 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.

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eAPPOINT

Addendums required as result of financial examination

Select Examination Invoice

	Invoice Date	Quarter	Year	Invoice Number	Invoice Due Date
<input checked="" type="radio"/>	06/01/2018	Q2	2017	Q22017-8686	07/31/2018

Cancel Back Next

- On the New Submittal Created screen, you need to enter a submittal name and then click the Done button.



New Submittal Created

Common Tasks

- Start a new submittal (2 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench (3 - current outstanding)
- Apply for a PSA License & Initial Appointment

A new submittal has been started, as indicated below.

Submittal Type: Addendums required as result of financial examination

Date Created: 6/1/2018 09:51:37 AM

You can give this submittal a name in the block below. Naming the submittal is optional. Most Preenneed 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, dick on the HELP tab above.

Submittal Name:

[Done](#)



- From the Main Workbench screen, you will then select the hyper-link associated with the submittal that you just created.



Main Workbench

Common Tasks

- Start a new submittal (2 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench (3 - current outstanding)
- Apply for a PSA License & Initial Appointment

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, dick 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

Type	Name	Type	Date Created
Addendums required as result of financial examination	2017_Q2_examination	ORIGINAL	6/1/2018 09:51:37 AM
Terminate Appointments	practice	ORIGINAL	2/2/2015 02:07:34 PM
New Appointments	Carol Taylor Block	ORIGINAL	8/4/2010 03:32:13 PM

[Delete Submittal](#)

- On the Addendums required as result of financial examination screen, click on the Component hyper-link to open the submittal.



Common Tasks

- **Start a new submittal**
(8 - current outstanding)
- **Review Paid/Final submissions**

Other Places

- **eAppoint workbench**
(3 - current outstanding)
- **Apply for a PSA License & Initial Appointment**

Addendums required as result of financial examination

Submittal Type: Addendums required as result of financial examination

Date Created: 6/7/2018 03:42:32 PM

Submittal Name: 2017_Q2_examination

[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 Remittance Examination	6/7/2018 03:42:32 PM	Incomplete	Incomplete

[Return to Main Workbench](#)


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

- 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.


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Common Tasks

- Start a new submittal (2 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench (3 - current outstanding)
- Apply for a PSA License & Initial Appointment

Addendums required as result of financial examination

DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS

If not reported in full by 5:00 PM on JULY 31, 2018, the Department will assess a late fee citation to the listed preneed quarterly remittance invoice.

Invoice Number: Q22017-8686 Quarter: Q2 Year: 2017


	Reported	Adjusted Total Counts	Adjusted Amounts
1. Number of contracts assigned from other institutions:	0	0	0
2. Number of contracts entered into during calendar year; lines 3 + 4:	14	16	2
3. Number of Trust Fund contracts written and sold by you:	0	0	0
4. Number of Insurance Funded contracts written and sold by you:	14	16	2
5. Number of contracts sold by you and cancelled within 30 days after the date of execution of the contract:	0	0	0
6. Total contracts written where remittance is due; lines (3 + 4) - 5:	14	16	2
7. Consumer Protection Trust Fund Remittance due (\$1 per contract):			\$2.00
8. Regulatory Trust Fund Remittance due (\$6 per contract):			\$12.00
9. Current total available credit:			\$70.00
10. Total Amount Due; lines (7 + 8) - 9:			\$0.00
11. Total available credit after submission:			\$56.00

Return to Workbench
Submit


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.


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Common Tasks

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

Other Places

- [eAppoint workbench](#)
(5 - current outstanding)
- [Apply for a PSA License & Initial Appointment](#)

Addendums required as result of financial examination

DO NOT INCLUDE CONTRACTS THAT ONLY INVOLVE BURIAL RIGHTS

If not reported in full by 5:00 PM on OCTOBER 8, 2018, the Department will assess a late fee citation to the listed preneed quarterly remittance invoice.

Invoice Number: Q12017-9427 **Quarter:** Q1 **Year:** 2017

	Reported	Adjusted Total Counts	Adjusted Amounts
1. Number of contracts assigned from other institutions:	0	0	0
2. Number of contracts entered into during Quarter 1; lines 3 + 4:	2	17	15
3. Number of Trust Fund contracts entered into during Quarter 1:	0	15	15
4. Number of Insurance Funded contracts entered into during Quarter 1:	2	2	0
5. Number of contracts sold by you and cancelled within 30 days after the date of execution of the contract:	0	0	0
6. Total contracts written where remittance is due; lines (3 + 4) - 5:	2	17	15
7. Consumer Protection Trust Fund Remittance due (\$1 per contract):			\$15.00
8. Regulatory Trust Fund Remittance due (\$6 per contract):			\$90.00
9. Current total available credit:			\$21.00
10. Total Amount Due; lines (7 + 8) - 9:			\$84.00
11. Total available credit after submission:			\$0.00

Return to Workbench
Check Out and Pay Fees
Mail In Payment

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.

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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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Payment / Submittal required on


Type	Name	Type	Date Created
Preneed Quarterly Remittance Addendums	test2	ORIGINAL	6/ 1/2018 01:57:15 PM
Preneed Quarterly Remittance Addendums	2017_Q4_Addendu	ORIGINAL	6/ 1/2018 12:08:17 PM
Preneed Quarterly Remittance Addendums		ORIGINAL	6/ 1/2018 12:06:55 PM
New Appointments	Jeff Haney	ORIGINAL	8/2/2007 12:53:35 PM
New Appointments		ORIGINAL	2/ 14/2006 01:45:28 PM

Delete Submittal

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


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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?	Type	Name	Type	Date Created
<input checked="" type="checkbox"/>	Preneed Quarterly Remittance Addendum s	<u>test2</u>	ORIGINAL	6/1/2018 01:57:15 PM
<input type="checkbox"/>	Preneed Quarterly Remittance Addendum s	2017_Q4_Addendu	ORIGINAL	6/1/2018 12:08:17 PM
<input type="checkbox"/>	Preneed Quarterly Remittance Addendum s		ORIGINAL	6/1/2018 12:06:55 PM
<input type="checkbox"/>	New Appointments	Jeff Haney	ORIGINAL	8/2/2007 12:53:35 PM
<input type="checkbox"/>	New Appointments		ORIGINAL	2/14/2006 01:45:28 PM

→
Delete Selected Submittal
Cancel

- 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.

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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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Payment / Submittal required on

Type	Name	Type	Date Created
Preneed Quarterly Remittance Addendums	2017_Q4_Addendu	ORIGINAL	6/1/2018 12:08:17 PM
Preneed Quarterly Remittance Addendums	[REDACTED]	ORIGINAL	6/1/2018 12:06:55 PM
New Appointments	Jeff Haney	ORIGINAL	8/2/2007 12:53:35 PM
New Appointments		ORIGINAL	2/14/2006 01:45:28 PM

Delete Submittal

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

Preeed Quarterly Remittance Addendum

Submittal Type: Preeed Quarterly Remittance Addendums
Date Created: 6/1/2018 12:06:55 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 Remittance Addendums	6/1/2018 12:06:55 PM	Incomplete	Incomplete

Return to Main Workbench

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

Edit Submittal Details

Submittal Details

Component List: Preeed Quarterly Remittance Addendums
Date Created: 6/1/2018 12:06:55 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

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

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Common Tasks

- Start a new submittal (7 - current outstanding)
- Review Paid/Final submissions

Other Places

- eAppoint workbench (4 - current outstanding)
- Apply for a PSA License & Initial Appointment

Main Workbench

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Payment / Submittal required on

Type	Name	Type	Date Created
Preneed Quarterly Remittance Addendums	2017_Q4_Addendu	ORIGINAL	6/1/2018 12:08:17 PM
Preneed Quarterly Remittance Addendums	Updated Submittal Name	ORIGINAL	6/1/2018 12:06:55 PM
New Appointments	Jeff Haney	ORIGINAL	8/2/2007 12:53:35 PM
New Appointments		ORIGINAL	2/14/2006 01:45:28 PM

Delete Submittal