

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 <u>https://iportal.fldfs.com/FCCS_eAPPOINT/</u>. 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.

		ONIS EF FINANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
Common Tasks Register as appointing end Activate your Appointing En account Set up a Servi Agency accou Retrieve lost passw ord	tity tity icing nt	Please enter your user Portal. Click 'submit' to User Name: testing@gmail Password:	Log on to mame and passwo continue.	to the Indu	stry Portal the Industry

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.

		; IANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
САРРО	ÎNT			M	ly Account
Account Tasks • View your acco • Maintain third party/servicin	ount g	ange your eAppoint us orredt, dick on UPDATE oint account, or to set of AIN THIRD PARTIES be r the data fields on thi	ername or password MY ACCOUNT below or change the allow e low. Click on the HEI s page. When finishe	l, or if any data on th . To authorize Third P ed access level for a 1 .P tab above for info ed, or if you have no	is screen is missing Party access to you Third Party, click on about Third Partie: change press
agency account	Appo	inting Entity Details			
 Address maint 	enance	Entity Name:			
Phone mainten	Cont	act Person First Name: THC	DMAS		
		Middle Teltish D			

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.

	Y PATRO	NIS FINANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
САРРОТ	NT	Mainta	ain Third Pa	rty/Servici	ing Agency Accounts
Account Tasks View your acco	unt th	e following accounts are a account as an authorized count, select an account a ird party/servicing agency	allowed to create and d third party/servicing and dick "Modify." To r, select an account ar	submit filings on yo agency, click "Add", remove an account a nd click "Remove".	ur behalf. To add . To change an as an authorized
party/servicing agency account	s	Third Party/Servicing A Email	gency Nickname	Permissions A	llowed
Address mainter Phone mainten	ance) june leverette@#################################	June Testir	• Preneed Q Remittanc	Quarterly e - SA Only
			Can	cel Add Moo	dify Remove

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

Home	Help	Contact Us	My Account	DFS Home	Logout
Сарра	DINT	Add Third	Party/Serv	ricing Agen	cy Accou
Account Tasks	Enter user. conti	r the email address of a . This account will be ab nue.	n I-Portal account yo le to create and sub	ou would like to add mit filings on your be	as an authorize half. Click "Next
View your ac					
 View your ac Maintain third party/servici agency account 	j E-Ma ng ints Creat	il address of I-Portal a	account to ad <mark>d: </mark> test(⊇fldfs.com	

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.

		NIS F FINANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
САРРО	ÎNT	Add Third	Party/Serv	icing Agen	cy Account
Account Tasks	Т	he account test@fldfs.com	was not found. Click	"Back" to search for	another account.
• View your acc	ount			I	Cancel Back
 Maintain third party/servicir agency accourt Address maint Phone mainter 	ng hts tenance nance				^

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.

	IY PATRONI	S NANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
Account Tasks	The a	Add Third	Party/Serv	yicing Agen	cy Account
 View your acc Maintain third party/servicin agency accour Address maint Phone mainter 	ount Ig renance nance			Cance	I Back Next

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

NOTE: For <u>Servicing Agent</u> type users, the only permission that can be assigned is the "Report Quarterly Remittance Sales – Servicing Agent Only" option. <u>Third Party</u> 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.

Count Tasks Maintain Third Party/Servicing agency, click "Add". To change 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, click "Add". To change an account, select an account and click "Modify." To remove 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". Maintain third party/servicing agency accounts Third Party/Servicing Agency [June Testing] Permissions Allowed Address maintenance June Leverette@ June Testing Preneed Quarterly Remittance - SA Only Image: Servicing By the sting) Image: Servicing By the sting) Image: Servicing By the sting) Servicing By the sting)	Home	Help	Contact Us	My Account	DFS Home	Logout
View your account an account as an authorized third party/servicing agency, click Add . Io change an account as an authorized third party/servicing agency, click Add . Io change an account as an authorized third party/servicing agency, click Add . Io change an account as an authorized third party/servicing agency, select an account and click "Modify." To remove an account as an authorized third party/servicing agency, select an account and click "Remove". Maintain third party/servicing agency agency accounts Third Party/Servicing Agency Email Nickname Permissions Allowed Address maintenance june.leverette@mail.com June Testing • Preneed Quarterly Remittance - SA Only Phone maintenance uat_testing@gmail.com (uat John Doe • Preneed Quarterly Remittance - SA Only	Count Tasks	ÎNT	Mainta following accounts are all	in Third Part	bmit filings on you	ng Ageno Accoun
Address maintenance june.leverette@mail.com June Testing Preneed Quarterly Remittance - SA Only uat_testing@gmail.com (uat testing)	View your acc Maintain third party/servicin agency accou	and account thir account thir account thir account the second sec	Third Party/Servicing Age Email	ning party/servicing ag d dick "Modify." To ren select an account and ncy Nickname	Permissions Allo	s an authorized
Uuat_testing@gmail.com (uat John Doe Preneed Quarterly Remittance - SA Only	Address main Phone mainte	tenance C	june.leverette@ lever ette (June Leverette)	June Testing	Preneed Qu Remittance	arterly - SA Only
			uat_testing@gmail.com (u testing)	at John Doe	Preneed Que Remittance	arterly - SA Only

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, <u>you do not need</u> 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".

	1Y PATRONIS	ANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
Common Tasks • Start a new su (7 - current outsta • Review Paid/I submissions	in T welco Appo relate subm progr Dep ar appoi Accou	ome to the Florida intment System (ed submissions to ittal. To work on ress submittal. To rtment, click Revie inting entity account.	Department of F eAppoint). Here, the Department. an existing submi review a submiss w Paid/Final sub unt, click Activate	inancial Service you can send a To begin, click ittal, click Work sion already sen missions. To ac your Appointin	eAppoint s Producer pointment- Start a new on an in- t to the tivate your g Entity
Other Places	Refun	d Policy for Pren ission	eed Sales Agent /	Appointment-Re	lated
 eAppoint work (4 - current outstate) Apply for a PS License & Initi Appointment 	cbench nding) A 469.4 al appoi payer refun for th	ppointment fee is 166 (2)(h) F.S. ar intment is process within 60 days o d the payer entitl e appointment.	not subject to re d Rule 69K-5.00 sed, a refund may f a duplicate appe ed to receive in o	efund in accord 3(6) F.A.C. If a be requested i ointment, the Di onnection with	ance with section duplicate n writing by the ivision shall the application
	Servi	ces for questions	by phone (850)	413-3039, mail	or fax.

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

	MY PATRONIS RIDA'S CHIEF FINA	NCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout



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.

Home	Hel	p	Contact	Us	My Acco	ount DFS H	ome	Logout
Сарр	OINT	Select	Pro	eneed	Qua	rterly Ren	nittanc	e Invo
Start a new	submittal	Selec	t Preneed Quar	rterly Remit	ttance I	nvoice	Invoice	Due Date
Deview Deid	/Final	0	04/01/2018	Q1	2018	Q12018-9456	05/31/2	2018
Review Pain	,	•	01/01/2018	Q4	2017	Q42017-9456	03/02/2	2018
submissions								
her Places							Cancel	Back Ne
ther Places eAppoint wo (4 - current outs	rkbench tanding)						Cancel	Back Ne

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.

Home	Hel	p Contact Us	My Account	DFS Home	Logout
Сарро	DÎNT			Main	Workbend
ommon Tasks Start a new s	ubmittal	submittal, it is included you want to delete any be given a screen from	tais you nave created b below . Click on any liste listed submittal, click on w hich to choose w hich s	d submittal, to open DELETE SUBMITTAL I submittal to delete.	and work on it. If below , and you wil
Review Paid/ submissions	'Final	WARNING: This website and directions regarding You must disable or turn feature within your web Payment / Submittal r	uses pop-up messages g your submittal to the P n-off your pop-up blocke browser in order to vie	to inform you of imp lorida Department of r for this website if y w these important m	ortant information f Financial Services ou are using such ressages.
Review Paid/ submissions	'Final	WARNING: This website and directions regarding You must disable or turn feature within your web Payment / Submittal r Type	uses pop-up messages g your submittal to the F n-off your pop-up blocke browser in order to vie equired on Name	to inform you of imp lorida Department of r for this website if y w these important m Type	ortant information f Financial Services ou are using such ressages. Date Created
Review Paid/ submissions ther Places eAppoint work (5 - current outsta	kbench	WARNING: This website and directions regarding You must disable or turn feature within your web Payment / Submittal r Type Preneed Quarterly Remitt	uses pop-up messages g your submittal to the F -off your pop-up blocke browser in order to vie equired on Name tance 2017_Q4_Quar Remittance	to inform you of imp lorida Department of r for this website if y w these important m Type ty ORIGINAL	ortant information f Financial Services ou are using such ressages. Date Created . 6/ 1/2018 03:16:50 PM
eAppoint work (5 - current outsid eAppoint work (5 - current outsid Apply for a PS License & Init	kbench anding) 5A tial	WARNING: This website and directions regarding You must disable or turn feature within your web Payment / Submittal r Type Preneed Quarterly Remit Addendums	uses pop-up messages g your submittal to the F -off your pop-up blocke browser in order to vie equired on Name cance 2017_Q4_Quar Remittance cance 2017_Q4_Adde	to inform you of imp lorida Department of r for this website if y w these important m Type ty OR IGINAL ndu OR IGINAL	ortant information f Financial Services ou are using such essages. Date Created 6/ 1/2018 03: 16:50 PM 6/ 1/2018 12:08: 12 PM
ther Places eAppoint wor (5 - current outstat Apply for a PS License & Init Appointment	kbench anding) 5A bial	WARNING: This website and directions regarding You must disable or turi feature within your web Payment / Submittal r Type Preneed Quarterly Remit Addendums Preneed Quarterly Remit Addendums	uses pop-up messages g your submittal to the P h-off your pop-up blocke browser in order to vie equired on Name cance 2017_Q4_Quar Remittance cance 2017_Q4_Adde	to inform you of imp lorida Department of r for this website if y w these important m Type dy OR IGINAL ndu OR IGINAL ittal Name OR IGINAL	Ortant information f Financial Services ou are using such essages. Date Created 6/1/2018 03:16:50 PM 6/1/2018 12:08:11 PM 6/1/2018 12:08:52 PM
ther Places eAppoint wor (5 - current outsta Apply for a PS License & Init Appointment	kbench anding) SA tial	WARNING: This website and directions regarding You must disable or turn feature within your web Payment / Submittal r Type Preneed Quarterly Remit Addendums Preneed Quarterly Remit Addendums New Appointments	uses pop-up messages g your submittal to the P n-off your pop-up blocke browser in order to vie equired on 2017_Q4_Quar Remittance cance 2017_Q4_Adde cance Updated Subm Jeff Haney	to inform you of imp lorida Department of r for this website if y w these important m Type ty ORIGINAL ndu ORIGINAL ittal Name ORIGINAL	Ortant information financial Services ou are using such essages. Date Created 6/1/2018 03:16:5 PM 6/1/2018 12:08:11 PM 8/2/2007 12:53:33 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.

Home	Help	Contact Us	My Account	DFS Home	Logout
САррон	NT		Preneed (Quarterly	Remittan
Common Tasks	Sub D Subr	mittal Type: Preneed Q ate Created: 6/ 1/2018 (mittal Name: 2017_Q4_(uarterly Remittance 33:16:50 PM Quartly Remittance		
(6 - current outstandi	ing)	Edit Su	bmittal Name		
6 - current outstandi Review Paid/Fin submissions	ing) ial Liste	Edit Su ed below are all the co ponent, click on its na ent details of your sul	omponents required to su me. Your changes are au omittal, click "Review this	ubmit this submitt. utomatically saved Submittal".	al. To view a . To review the
(6 - current outstandi Review Paid/Fin submissions	nal Liste	Edit Su d below are all the co ponent, click on its na ent details of your sul mponent	bmittal Name omponents required to so me. Your changes are au bmittal, click "Review this Last Updated	ubmit this submitta itomatically saved Submittal". Submission Status	al. To view a . To review the Payment Status
(6 - current outstandi Review Paid/Fin submissions Other Places	al Liste com curre anch ng) Pre Rer	Edit Su ed below are all the co ponent, click on its na ent details of your sul mponent meed Quarterly mittance	bmittal Name omponents required to so me. Your changes are au omittal, click "Review this Last Updated 6/1/2018 03:16:50 PM	ubmit this submitt. utomatically saved Submittal". Submission Status Incomplete	al. To view a . To review the Payment Status Incomplete

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.

JIMMY PATI	RONIS IIEF FINANCIAL OFFICE	R		
Home He	lp Contact Us	My Account	DFS Home	Logout
CAPPOINT	Prer	need Quarterl	y Remittan	ce Invoice
Common Tasks	DO NOT INCLUE	E CONTRACTS THAT O	NLY INVOLVE BURL	AL RIGHTS
• Start a new submittal	If not reported in full by penalty to the listed pre	5:00 PM on AUGUST 30, 3 need quarterly remittanc	2018, the Departmen e invoice.	t will assess a
Review Paid/Final submissions	Invoice Number: Q2201	8-9427 Quarte	r: Q2 Year:	2018
	Click here if there are n	o sales to report for thi	s quarter:	
Other Places • eAppoint workbench (3 - current outstanding) • Apply for a PSA	 Number of contracts Number of contracts 	s assigned from other ir 5 entered into during Qu	uarter 2;	0
License & Initial Appointment	lines 3 + 4: 3. Number of True Ouarter 2:	st Fund contracts entere	ed into during	0
	4. Number of Insu during Quarter	urance Funded contracts 2:	s entered into	0
Appointing Entity Info	5. Number of contract	s cancelled within thirty	/ days:	0
• THE FRALIN GROUP INC (115639)	6. Total contracts lines (3 + 4) - 5	written where rem 5:	iittance is due;	0
	7. Consumer Protectio contract):	n Trust Fund remittance	e due(\$1 per	\$ 0.00
	8. Regulatory Trust Fu	nd remittance due(\$6 p	per contract):	\$ 0.00
	9. Current total availa	ble credits:		\$ 0.00
	10. Total Amount [)ue; lines (7 + 8) -	9:	\$ 0.00
	11. Total available cree	dit after submission:		\$ 0.00
			Return to Workben	ch Submit

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.

JIMMY PATE	RONIS IEF FINANCIAL O	FFICER				
Home He	lp Conta	ict Us My A	ccount	DFS Home		Logout
	I	Preneed Q	uarterl	y Remittar	ice]	Invoice
Common Tasks	DO NOT I	NCLUDE CONTRAC	TS THAT ON	ILY INVOLVE BUR	IAL RIG	GHTS
• Start a new submittal	If not reported in penalty to the list	full by 5:00 PM on A ed preneed quarter	UGUST 30, 2 ly remittance	2018, the Departme e invoice.	nt will a	assess a
Review Paid/Final submissions	Invoice Number:	Q22018-9427	Quarte	r: Q2 Year	2018	
	Click here if ther	e are no sales to re	port for this	s quarter:		
Other Places • eAppoint workbench	1. Number of co	ntracts assigned fi	om other in	stitutions:	0	
Apply for a PSA License & Initial Appointment	 Number of collines 3 + 4: Number Ouarter 	ntracts entered int of Trust Fund cont	o during Qu racts entere	arter 2; d into during		45 15
	4. Number during Q 5. Number of co	of Insurance Fund uarter 2: ntracts cancelled v	ed contracts within thirty	entered into days:		30
	6. Total cont lines (3 +	racts written w 4) - 5:	here rem	ittance is due;		40
	7. Consumer Proceedings of Construct	otection Trust Fund	l remittance	due(\$1 per	\$	40.00
	8. Regulatory T	rust Fund remittan	ce due(\$6 p	er contract):	\$	240.00
5	9. Current total	available credits:		\rightarrow	\$	2,000.00
	10. Total Amo	ount Due; lines	(7 + 8) -	9:	\$	0.00
	11. Total availat	ole credit after sub	mission:		\$	1,720.00
				Return to Workbe	nch	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 actuall 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.

JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER											
Home He	lp	Contact Us	My Account	DFS Home	Logout						
		Prene	ed Quarter		ICE INVOICE						
	If not reported in full by 5:00 PM on AUGUST 30, 2018, the Department will assess a										
Start a new submittal Review Paid/Final submissions	penalt Invoic	y to the listed prenee e Number: Q22018-9	427 Quarterly remittand	er: Q2 Year:	: 2018						
Other Places • eAppoint workbench	Click h 1. Nu	ere if there are no s mber of contracts as	ales to report for th	is quarter:	0						
(3 - current outstanding) • Apply for a PSA License & Initial Appointment	2. Nu lin 3.	mber of contracts er les 3 + 4: Number of Trust F Quarter 2: Number of Insurai	ntered into during Q fund contracts enter nce Funded contract	uarter 2; ed into during s entered into	25						
	5. Nu	during Quarter 2: mber of contracts ca	ncelled within thirty	y days:							
	6. T lii	otal contracts wi nes (3 + 4) - 5:	ritten where ren	ittance is due;	22						
	7. Co	nsumer Protection T	rust Fund remittanc	e due(\$1 per	\$ 22.00						
	8. Re	gulatory Trust Fund	remittance due(\$6	per contract):	\$ 132.00						
	9. Cu	rrent total available	credits:	\longrightarrow	\$ 21.00						
	10. T	otal Amount Due	e; lines (7 + 8) -	9:	\$ 133.00						
	11. To	otal available credit a	after submission:	\checkmark	\$ 0.00						
		Return to Workbe	ench 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.



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.

uter Payment Information.	
our account dataits are shown below. Palase	enter details of the payment you want to make, and then exect Continue to proceed
You have selected to pay using a Card Ao the payment type, please select the Card	ccount. The payment type cannot be changed on this payment screen. If you need to chang al button at the bottom of this page to go back and change your selection (1004)
Inter Payment Information	
Retrieved Account Details	
Account Number	1434785
Email Address*	test_account@gmail.com
Funding Source Details	
Payment Method* :	Card Account
Name on Cardh:	test user
Card Number*:	
	🚥 🚥 🗝
Expiry Deter	12/18
Card CN/ Not	(map)
Card C. 7 (10)	What is this?
Address Line 1*	323 lost avenue
Address Line 2	
CR1*:	Tatanasce
Stala* :	Florida 👻
Country* :	USA 👻
Zip* :	32301
Fater Desmant Datalla	
Dayment Details	0606/2018
Disconant Amount	Description Description Description
Payment Amount	Payment Amount Due (2022-10.) This is Payment Amount Due
Enter Additional Payment Details	
Total Services Amount	\$ 602.00
Convenience Fee :	5 30.10
Applicant Name :	

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.

JIMMY PA FLORIDA'S C	TRON	IIS FINANCIAL OFFICER					
Verify Payment Details							
Please review the details of the payme	ent you h	nave entered and select Confirm to submit the payment for processing.					
Verify Payment Details							
Account Details							
Account Num	ber :	1434825					
Email Addr	ess :	test.test@gmail.com					
Funding Source Details							
Name on C	and :	test account					
Card Num	ber :	20000000005454					
Expiry D	ate :	12/18					
Address Lin	e1:	123 testing drive					
Address Lin	e 2 :						
(City :	tallahassee					
SI	tate :	FL					
Cou	ntry :	United States of America					
	Zip :	32301					
Payment Details							
Payment [Date :	06/06/2018					
Payment Amo	unt :	\$ 632.10					
Additional Payment Details							
Total Services Amo	unt :	\$ 602.00					
Convenience	Fee :	\$ 30.10					
Applicant Na	me :	— /					
By clicking Confirm to confirm your particle Account, as detailed above. The paccount will occur within two business successors or assigns), to process this Additionally, by clicking confirm, your a	ayment, y payment days of s debit to	you authorize us to initiate a debit from the Fayment Method Account to make a payment to to your account will be made on the Payment Date detailed above, and the debit from your that date, but no earlier than that date. You also authorize your financial institution (and its p your account.					
of energies of the second sec							

Confirm

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.

JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER									
Home	Hel	р	Contact U	s	Му Ассо	unt	DFS Home		Logout
САРРО						Payı	nent	Wizard	
Common Tasks • Start a new st (5- current outsta • Review Paid/ submissions	ubmittal anding) Final	This is the agreemen the Prene making th on NEXT. change in available submittal	e electronic si nt to the state eed Business his submittal f Click on CANC oformation you to you on you will not be ef	gnature ement in Licensee or that P CEL to ret u have er ur Workb ffective ur	page. Click the text. 1 's staffer of reneed But turn to Wo ntered in t ench for fu ntil you su	con the Then type or other a siness. T orkbench his subm urther pro bmit and	box adjacent to e in the name ar authorized repre Then select a pa . Clicking on CAN nittal, and the su ocessing. Howev I pay it online.	the text to d busines sentative yment opt ICEL will n bmittal wi yer, the or	p indicate sphone of who is ion, and click ot delete or ill still be hine
Other Places		V							
eAppoint worl (5 - current outsta	kbench anding)	Signatur Business	e: Phone:	test use 850-222	r -2222				
Apply for a PS License & Init Appointment	5A ial	Payment	t Method:	() Cred	it Card (● eChec	k _		Ţ
L								Can	cel Next

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

	A A /
JIMMY PATRON	NIS FINANCIAL OFFICER
nter Payment Information	
our 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 Ar the payment type, please select the Canc	ccount. The payment type cannot be changed on this payment screen. If you need to change el button at the bottom of this page to go back and change your selection.(1035)
nter Payment Information	
Retrieved Account Details	
Account Number:	1434793
Email Address* :	test_user@test.com
Funding Source Details	
Payment Method* :	Bank Account
	Memo
	Number
Name on Account* :	test Account
Personal or Commercial Account* :	Personal Bank Account Commercial Bank Account
Account Type* :	
Deuties Muschart	
Routing Number* :	063000047
Re-Enter Routing Number* :	063000047
Account Number* :	••••••
Re-Enter Account Number* :	·····
Enter Deument Datalla	
Payment Details	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 F	Payment is confirmed on the next page
	Cancel

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.

FI FI	IMMY PATRON LORIDA'S CHIEF I	IIS FINANCIAL OFFICER
Patron manual		
Verify Payment Details	s	
	-	
Please review the detail	s of the payment you h	ave entered and select Confirm to submit the payment for processing.
Verify Payment Deta	ils	
Assount Dataila		
Account Details		
1	Account Number :	1434793
	Email Address :	test_user@test.com
Funding Source Det	tails	
N	ame on Account :	test Account
	Account Type :	Checking
	Routing Number :	063000047
1	Account Number :	Checking - xxxxx7890
Doumont Dotaila		
Payment Details		
	Payment Date :	06/04/2018
F	Payment Amount :	\$ 217.00
Additional Payment	Details	
Total	Services Amount :	\$ 217.00
(Convenience Fee :	\$ 0.00
	Applicant Name :	test user
Pu clicking Confirm to a		you authorize us to initiate a debit from the Dayment Mathed Account to make a payment to
the Account, as detaile	d above. The payment	to your account will be made on the Payment Date detailed above, and the debit from your
account will occur within successors or assigns),	n two business days of to process this debit to	that date, but no earlier than that date. You also authorize your financial institution (and its o your account.
Additionally, by clicking	confirm, you also agre	e to and accept the Terms & Conditions for usage of this site.
		Cancel Edit Confirm

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.

JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER							
Home He	lp Contact Us	My Account	DFS Home	L	ogout		
CAPPOINT	Prene	ed Quarterl	y Remitta	nce Iı	nvoice		
Common Tasks	If not reported in full by 5:00				115		
Start a new submittal	penalty to the listed prenee	d quarterly remittance	e invoice.	t will asse	:55 a		
Review Paid/Final submissions	Invoice Number: Q42020-9	9379 Quarte	er: Q4 Ye	ar: 2020			
	Click here if there are no s	ales to report for this	s quarter:				
• eAppoint workbench (1 - current outstanding)	1. Number of contracts as	signed from other in	stitutions:	2			
Apply for a PSA	 Number of contracts en lines 3 + 4: 	tered into during Qu	arter 4;		33		
Appointment	 Number of Trust F Quarter 4: 	und contracts entere	d into during		15		
	4. Number of Insurar during Quarter 4:	nce Funded contracts	entered into		18		
Appointing Entity Info	5. Number of contracts ca	ncelled within thirty	days:		2		
	6. Total contracts wi lines (3 + 4) - 5:	ritten where rem	ittance is due;		31		
	7. Consumer Protection T	rust Fund remittance	due(\$1 per	\$	31.00		
	8. Regulatory Trust Fund	remittance due(\$6 p	er contract):	\$	186.00		
	9. Current total available	credits:		\$	0.00		
	10. Total Amount Due	e; lines (7 + 8) -	9:	\$	217.00		
	11. Total available credit a	after submission:		\$	0.00		
	Return to Workbe	nch Check Out a	nd Pay Fees	Mail In P	ayment		

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.

JIMMY PATE	RONIS	1			
Home He	p Contact Us	My Account	DFS Home	1	ogout
CAPPOINT	Pren		rly Remittai	nce I	nvoice
Common Tasks	If not reported in full by 5	OO PM on MARCH 2	2021 the Department		
Start a new submittal	Message from webnage	of Philippaken 2, 1	2021, the Department	X	ess a
Review Paid/Final submissions	message nom neopoge			2020	1
Other Places • eAppoint workbench (1 - current outstanding) • Apply for a PSA License & Initial Appointment Appointing Entity Info • ELLIPTIC ATTRACT	You have selected to remittance and main If you click OK you we preneed quarterly remitted address and instruct quarterly remittance If you would like to return to the 'prene select 'Check Out an remittance.	o print a paper copy of yo I it to the Division of Fune will no longer have the op emittance electronically. d quarterly remittance inv tions on how to complete e. To continue with this ac pay online, please click C ed quarterly remittance in nd Pay Fees' to continue y	our preneed quarterly ral & Cemetery Service. tion to pay your roice will have the e your preneed tion click OK. ANCEL below and nvoice' screen and our preneed quarterly	2	33 15 18 2 31 31.00
	8. Requiatory trust hun		per contract):		196.00
	o. Regulatory must run	a remittance due(\$	per contracty.	\$	186.00
	9. Current total availab	le credits:		\$	0.00
	10. Total Amount D	ue; lines (7 + 8)	- 9:	\$	217.00
	11. Total available cred	t after submission:		\$	0.00
	Return to Work	bench Check Ou	tand Pay Fees	Mail In F	Payment

21. 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.

JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER									
Home	Help	p	Contact Us	My Account	DFS Home	Logout			
Preneed Quarterly Remittanc						ce Invoice			
Common Tasks		If not reported in full by 5:00 PM on MARCH 2, 2021 , the Department will assess a late fee citation to the listed preneed quarterly remittance invoice.							
Start a new su Review Paid/F submissions	bmittal [:] inal	Invoice I	d: 46221	Quarter	:Q4 Ye	ar: 2020			
Submissions		Number of contracts assigned from other institutions:							
Other Places		Number	of Trust Fund cont	racts entered into de	uring Quarter 4:	15			
eAppoint work (1 - current outstar	bench nding)	Number (4:	of Insurance Fund	ed contracts entered	l into during Quarte	r 18			
Apply for a PS License & Initi	A al	Number	of contracts cance	lled within thirty day	ys:	2			
Appointment		Total contracts written where remittance is due:							
Appointing Entity	Info	Consumer Protection Trust Fund (RSC 319) remittance due(\$1 per \$31.00 contract):							
		Regulatory Trust Fund (RSC 330) remittance due(\$6 per contract): \$186							
		Total Am	ount Due:			\$217.00			
			Retu	m to Main Workben	ch Print	t 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.

		EAppoint - Preneed Quarterly Remittance - Internet Explorer		_		×
	1 🛞 i					^
	Home	Invoice Payment Receipt				
	Home	You have successfully submitted the following Preneed Quarter	rly Remittancefiling:			
ſ		Invoice Id:	46221			
		Invoice Year:	2020			
	CAP	Invoice Quarter:	Q4			
		Appointing Entity Name:	ALLERS PARENT OF MULTINE			
	Common Tas	FEIN:	i9-3156:			
		Submitted By:	RELIGES, WANNE C			
	• Start a ne	Date Submitted:	1/13/2022			
	Review Pa submissio	Number of contracts assigned from other institutions:	2			
		Number of Trust Fund contracts entered into during Quarter 4:	15			
	Other Place:	Number of Insurance Funded contracts entered into during Quarter 4:	18			
	 eAppoint v 	Number of contracts cancelled within thirty days:	2			
	(1 - current o	Total contracts written where remittance is due:	31			
	Apply for License &	Consumer Protection Trust Fund (RSC 319) remittance due (\$1 per contract):	\$31.00			
	Appointme	Regulatory Trust Fund (RSC 330) remittance due(\$6 per contract):	\$186.00			
		Invoice Total Amount Due(\$):	\$217.00			
	Appointing E	To remit preneed quarterlyinvoice, mail a copy of this comp money order payable to:	eted preneed quarterlyinvoice with	your ch	eck or	
	SELLERS HOME INC	Department of Finar	icial Services			
	HOPE IN	Attn: Revenue Proce	ssing Section			
		P.O. Box 6	100			
		Tallahassee, Florida	32314-6100			
			Close Window	Р	rint	
						\sim
					° 194%	•

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.

- JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER Home Help **Contact Us** My Account **DFS Home** Logout APPOINT eAppoint Welcome to the Florida Department of Financial Services Producer Common Tasks Appointment System (eAppoint). Here, you can send appointmentrelated submissions to the Department. To begin, click Start a new Start a new submittal submittal. To work on an existing submittal, dick Work on an in-(5 - current outstanding) progress submittal. To review a submission already sent to the Review Paid/Final Department, dick Review Paid/Final submissions. To activate your submissions appointing entity account, click Activate your Appointing Entity Account. Other Places **Refund Policy for Preneed Sales Agent Appointment-Related** Submission eAppoint workbench (2 - current outstanding) The appointment fee is not subject to refund in accordance with section Apply for a PSA 469.466 (2)(h) F.S. and Rule 69K-5.003(6) F.A.C. If a duplicate License & Initial appointment is processed, a refund may be requested in writing by the Appointment 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.
- 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, 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.

	IY PATRONI	S NANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
САРРО	ÎNT		Ne	ew Submitt	al Created
Common Tasks	Ane	w submittal has been s	tarted, as indicated	below.	
Start a new su (6 - current outsta	ibmittal nding)	Submittal Type: Pre Date Created: 6/1	eneed Quarterly Remi 1/2018 12:08:17 PM	ttance Addendums	
 Review Paid/F submissions 	Final You option name busin	can give this submittal a onal. Most Preeneed Bus ing submittals, that are ness. For more info on <u>r</u>	a name in the block b siness Licensees dev meaningful for them naming a submittal, cl	elow. Naming the su elop their own interr given the way they i ick on the HELP tab	bmittal is nal protocols for run their above.
Other Places		Submittal Name: 201	7_Q4_Addendum		
 eAppoint work (4 - current outstate Apply for a PS 	ading)				
License & Initi Appointment	al				

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

Home	Hel	p	Contact Us	My Account	DFS Home	Logout
Сарра	DINT				Main	n Workben
Common Tasks Start a new submittal (6 - current outstanding)		Below is a li submittal, it you want to	st of submittals y is included below delete any liste	ou have created but v. Click on any listed d submittal, click on D	not yet complete submittal, to ope DELETE SUBMITTA	ed. If you just opene n and workon it. If L below, and you w
Start a new s (6 - current outst	anding)	be given a s	oreen from which	n to choose which su	brittal to delete.	montant information
Start a new s (6 - current outst Review Paid/ submissions	aubmittal anding) /Final	be given a s WARNING: T and directio You must dis feature with Payment /	creen from which his website use: ns regarding you sable or turn-off in your web bro Subnittal requi	to choose which su pop-up messages t r submittal to the Flo your pop-up blocker vser in order to view red on	bmttal to delete. o inform you of in orida Department for this website if these important	portant information of Financial Services you are using such messages.
Start a new s (6 - current outst Review Paid/ submissions	ubmittal anding) /Final	be given a s WARNING: T and directio You must dis feature with Payment / Type	creen from which his website use: ns regarding you sable or turn-off in your web brow Submittal requi	r to choose which su pop-up messages t r submittal to the Flo your pop-up blocker vser in order to view red on	o inform you of im orida Department for this website if these important	portant information of Financial Services you are using such messages. Date Created
Start a new s (6 - current outst Review Paid/ submissions ther Places eAppoint wor (4 - current outst	ubmittal anding) /Final kbench anding)	be given a s WARNING: T and directio You must dis feature with Payment / Type Preneed Qu Addendums	areen from which his website use: ns regarding you sable or turn-off in your web brow Submittal requi	r to choose which su pop-up messages t r submittal to the Flo your pop-up blocker vser in order to view red on Name 2017_Q4_Ac	o inform you of im orida Department for this website if these important Type 3dendu ORIGINAL	portant information of Financial Services you are using such messages. Date Created 6/1/2018 12:08:17 f
Start a new s (6 - current outst Review Paid/ submissions ther Places eAppoint wor (4 - current outst Apply for a P License & Ini	kubmittal anding) /Final kbench anding) SA tial	be given a s WARNING: T and directio You must dis feature with Payment / Type Preneed Qu Addendums Preneed Qu	creen from which his website use: ns regarding you sable or turn-off in your web brow Submittal requi arterly Remittance arterly Remittance	r to choose which su pop-up messages t r submittal to the Flo your pop-up blocker vser in order to view red on Name 2017_Q4_A	o inform you of im orida Department for this website if these important Type Gendu ORIGINAL ORIGINAL	Date Created 6/1/2018 12:06:55
Start a new s (6 - current outst Review Paid/ submissions ther Places eAppoint wor (4 - current outst Apply for a P License & Ini Appointment	kubmittal anding) /Final kubench anding) SA tial	be given a s WARNING: T and direction You must dis feature with Payment / Type Preneed Qu Addendums Preneed Qu Addendums New Appoint	creen from which This website use: ns regarding you sable or turn-off in your web brow Submittal requi arterly Remittance arterly Remittance iments	s pop-up messages t r submittal to the Flo your pop-up blocker vser in order to view red on 2017_Q4_AC Jeff Haney	o inform you of im orida Department for this website if these important Type dendu ORIGINAL ORIGINAL ORIGINAL	Date Created 6/1/2018 12:06:55 0 8/2/2007 12:53:35 0

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

	Y PATRONIS	ANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
САРРО	ÎNT	Preneed (Quarterly R	emittance /	Addendum
Common Tasks • Start a new su (6 - current outsta • Review Paid/ submissions	ubmittal anding) Final Listed compo	ittal Type: Preneed Quar e Created: 6/1/2018 12:0 ttal Name: 2017_Q4_Add Edit Subm below are all the com ment, click on its name t details of your subm	terly Remittance Adden 08:17 PM andum ittal Name ponents required to : 2. Your changes are a ittal, click "Review thi	dums submit this submittal utomatically saved. is Submittal".	l. To view a To review the
Other Places	Com	ponent	Last Updated	Submission Status	Payment Status
(4 - current outsta	anding) Prend Adde	eed Quarterly Remittar ndums	nce 6/1/2018 12:08:17 PM	Incomplete	Incomplete
Appry for a Ps License & Init Appointment	jal	\int		Return to Main	Workbench

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

JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER								
Home	Hel	lp	Contact Us	My Account	DFS Home	Logout		
CAPPOINT			Preneed Q	uarterly Re	mittance A	ddendums		
Common Tasks		Please (continue	enter the Year and Q e.	uarter that you woul	d like to Adjust. Click	c"Next" to		
Start a new su (6 - current outsta	u bmittal anding)	Year :	2017 🗸	Quarte	r: Q4 🗸			
Review Paid/ submissions	Final					Back Done		
Other Places						7		
eAppoint work (4 - current outsta	kbench anding)					(
Apply for a PS License & Init Appointment	SA jal							

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.

JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER									
Home H	elp Contact	Js My Accoun	t DFS Home	Logout					
CAPPOINT	Prenee	d Quarterly	Remittance A	ddendums					
Common Tasks	Please enter the Year continue.	and Quarter that you	would like to Adjust. Clic	k "Done" to					
• Start a new submittal (2 - current outstanding)	Year : 2018 🗸	Q	uarter: Q2 🗸						
 Review Paid/Final submissions 				Back Done					
Other Places • eAppoint workbench (2 - current outstanding) • Apply for a PSA License & Initial Appointment	Message from web	page s no reported invoice a	t all for that year and qua	rter DK					

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.

Home	n Contact lic	My Account	DES Home		a a ut
Home Hei	contact us	My Account	Drs Home		gout
CAPPOINT	Preneed Quarte	rly Remitta	nce Adde	ndum	Detai
Common Tasks	If not reported in full by 5:00 assess a penalty citation to)pm on 30TH of Nover the listed preneed qu	mber, 2017, the l arterly remittand	Department œ invoice.	will
Start a new submittal	DO NOT INCLUDE CONTRA	CTS THAT ONLY INV	OLVE BURIAL F	RIGHTS	
Review Paid/Final submissions	All counts should be report	ed as absolute amou	nts for the quar	ber.	
Other Places	Invoice Number : Q32017-9	9427 Qua	rter:Q3 Yo	ear: 2017	
eAppoint workbench (3 - current outstanding)			Reporte	d Adjusted Total Counts	Adjusted Amounts
Apply for a PSA License & Initial Appointment	 Number of contracts a institutions: 	ssigned from other	(0 0	(
	 Number of contracts e 3; lines 3 + 4: 	entered into during Q	uarter 2	2 12	10
	3. Number of Trust F during Quarter 3:	und contracts entere	d into (10	10
	4. Number of Insurar entered into during	nce Funded contracts g Quarter 3:	. :	2 2	(
	Number of contracts of days:	ancelled within thirt	y (0 0	
	 Total contracts we remittance is due lines (3 + 4) - 5: 	ritten where ;	2	2 12	10
	 Consumer Protection (\$1 per contract): 	Trust Fund remittanc	e due		\$10.00
	8. Regulatory Trust Fund (\$6 per contract):	l remittance due			\$60.00
	9. Current total available	e credits:			\$21.00
	10. Total Amount Due	e; lines (7 + 8) -	9:	\sim	\$49.00
	11. Total available credit	after submission:			\$0.00
	Note: A comment is required whe submitting an addendum.	en You will for the	l need to ent- adjustment h	er the rea	⁵⁰⁰ ^
					\sim
			Mail I	- D	

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.

Home	Help	Contact Us	My Account	DFS Ho	me	Log	jout
САРРО	і́лт Рге	eneed Quarte	erly Remitta	ince Ad	dend	um C)etai
Common Tasks	If no asso	ot reported in full by 5:0 ess a penalty citation to	0pm on 30TH of Nove the listed preneed q	ember, 2017, Juarterly remi	the Depar ttance invo	rtment w oice.	ill
Review Paid/F submissions	inal Allo	NOT INCLUDE CONTR/	ACTS THAT ONLY IN	IVOLVE BURI	AL RIGHT	rs	
ther Places	Inve	oice Number : Q32017-9	9427 Qu	arter : Q3	Year: 2	017	
eAppoint work (3 - current outstar	bench bding)			Rep	orted Ad	justed / Total / Counts	Adjusted Amount
Apply for a PS License & Initi Appointment	A 1.	Number of contracts a institutions:	assigned from other		0	0	0
	2.	Number of contracts of 3; lines 3 + 4:	entered into during	Quarter	2	0	-3
	3.	Number of Trust F during Quarter 3:	und contracts enter	ed into	o <mark>i</mark>	0	
	4.	Number of Insura entered into durin	nce Funded contract g Quarter 3:	ts .	2	0	-3
	5.	Number of contracts of days:	cancelled within thir	ty	0	0	
	0.	remittance is due lines (3 + 4) - 5:	;		2	U	<u> </u>
	7.	Consumer Protection (\$1 per contract):	Trust Fund remittan	ce due			\$2.00
	8.	Regulatory Trust Fund (\$6 per contract):	d remittance due			~	\$12.00
	9.	Current total available	e credits:	0:		\neg	\$21.00
	11.	. Total available credit	after submission:	3.		->	\$35.00
	Na A c su	o te: comment is required who brritting an addendum.	en You wi for th	ll need to e adjustmen	enter th t here.	ne reas	on ^
	_						
		Suit	omit	Ret	um to Wo	rkbench	

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".

Home	Help	Contact Us	My Account	DFS Home	Logout
САРРО	ÎNT	/			eAppoint
Start a new sul (1 - current outstar Review Paid/F submissions	bmittal bmi	ome to the Florida intment System (ed submissions to nittal. To work on ress submittal. To rtment, dick Revio inting entity account.	a Department of F eAppoint). Here, the Department. an existing subm review a submiss ew Paid/Final sub unt, dick Activate	To begin, dick s ittal, click Work sion already sen missions. To ac	s Producer opointment- Start a new on an in- t to the tivate your g Entity
Other Places eAppoint work 	Refu Subn	nd Policy for Pren nission	eed Sales Agent /	Appointment-Re	lated
Apply for a PS/ License & Initi Appointment	A The a al 469 appo paye refur for th	appointment fee is 466 (2)(h) F.S. ar intment is process r within 60 days o ad the payer entiti ne appointment.	a not subject to re ad Rule 69K-5.00 sed, a refund may f a duplicate app ed to receive in c	efund in accorda 3(6) F.A.C. If a y be requested in ointment, the Di onnection with t	ance with section duplicate n writing by the vision shall the application
	Pleas	e contact the Divisions	sion of Funeral, C by phone (850)	Cemetery, and C 413-3039, mail	onsumer or fax.

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.

Home	Help	Contact Us	My Account	DFS Home	Logout		
Сарро	ÎNT		s	Select Subm	ittal Type		
ommon Tasks	Selec	t the type of submittal	you want to start. Cli	ck "Next" to continue			
Start a new su (1 - current outsta	nding) Select	t type of submittal ew Appointments					
Review Paid/I submissions		enew Appointments					
)ther Places	OTe	erminate Appointment	5				
eAppoint work	dench O Pr	reneed Quarterly Rem	ittance				
Apply for a PS License & Initi Appointment	ial O Pr	O Preneed Quarterly Remittance Addendums					
and the second second second	<u> </u>	ayment for Preneed Q	uarterly Remittance	Citations (1 - current o	utstanding)		
	0 A(ldendums required as	result of financial e	xamination	V		
				Cancel	Back Next		

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.

		IIS FINANCIAL OF	FICER			
Home	Help	Conta	ct Us	My Account	DFS Home	Logout
САРРО	ÎNT	(Citatior	Invoice	for Preneed F	l Quarterly Remittance
Common Tasks	Sele duraittal Sel	ect a Citation In lect a Citation I	ivoice for Pre Invoice for P	need Quarterly R reneed Quarterl	emittanœ. Click "Nex y Remittance	t" to continue.
(3 - current outsta	nding)	Invoice Date	Quarter Ye	ar Invoice Number	Invoice Due Date	Туре
 Review Paid/I submissions 	Final	05/31/2018	Q4 20	Q42017-8686	08/06/2018	Late Addendum
		06/01/2018	Q2 20	17 Q22017-8686	08/07/2018	Examination
Other Places • eAppoint work (2 - current outsta • Apply for a PS License & Initi Appointment	doench nding) GA ial		1 I	Di	spute Cancel	Back Next

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.

	JIMMY PATRONIS FLORIDA'S CHIEF FINANCIAL OFFICER									
Home	Hel	р	Contact Us	My Acco	ount	DFS	Home	Logout		
САРРС	DINT						Main	Workbench		
Common Tasks • Start a new s	ubmittal	Below is submitta you war be giver	s a list of submitta al, it is induded be nt to delete any lis n a screen from wi	ls you have created low. Click on an sted submittal, hich to choose y	ated but ny listed s dick on D which sub	not yet submitta ELETE S omittal to	completed. Il, to open UBMITTAL I o delete.	If you just opened a and work on it. If below, and you will		
Review Paid/ submissions	Final	W ARNIN and dire You mus feature	IG: This website u actions regarding y st disable or tum⊣ within your web b	ses pop-up me: your submittal t off your pop-up prowser in orde	ssages to o the Flo blocker f r to view	o inform rida Dep orthis w these in	you of important of rebsite if you reportant m	ortant information Financial Services. ou are using such a essages.		
Other Places		Payme	nt / Submittal rec	quired on						
eAppoint work	kbench	Туре			Name		Туре	D ate Created		
Apply for a PS	SA	Pa ym ei Citatio r	nt for Preneed Quart	erly Remittance	2017_Q4	-Citatio	ORIGINAL	5/31/2018 02:42:54 PM		
License & Init Appointment	ial						D	elete Submittal		

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.

		ONIS EF FINA	NCIAL OFFICER				
Home	Help)	Contact Us	My Account		DFS Home	Logout
САРРО	NT		Citatio	on Invoice	for	Preneed R	Quarterly emittance
Common Tasks Start a new sul Review Paid/Fisubmissions 	bmittal inal	Submitt Date Submitt Listed b compon	tal Type: Payment for F Created: 5/31/2018 02 al Name: 2017_Q4_Cita Edit Subm elow are all the com ent, click on its name details of your subm	Preneed Quarterly Rem : 42:54 PM tion nittal Name ponents required to e. Your changes are i ttal. click "Peview th	subm autom	Citations it this submittal natically sa ved. T writa!"	. To view a To review the
Other Places					13 300	initiation .	
eAppoint work	bench	Compo	onent	Last Update	be	Submission Status	Payment Status
Apply for a PSA	A J	Payme Remitta	nt for Preneed Quart ance Citations	terly 5/31/2018 02:42:54 PM	1	Incomplete	Incomplete
Appointment		-	T		F	Return to Main	Workbench

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.

		IIS FINANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
САРРО	ÎNT	Citatio	on Invoice f	for Preneed F	l Quarterly Remittance
Common Tasks	If r	not reported in full by 5:00	PM on JULY 15, 201	8, the Department v	vill assess a late
 Start a new submissions 	ubmittal Final	voice Number: Q42017-9 otal Amount Due:	209 Quarter:		ar: 2017 \$200
Other Places • eAppoint worl (1 - current outsta • Apply for a PS License & Init Appointment	kbench Inding) 6A ial	Return to Workb	ench Check Out	t 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".



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.

		ONIS EF FINANCIAL C	OFFICER			
Home	Help	Cont	act Us	My Account	DFS Home	Logout
САРРО	ÎNT		Citation	Invoice	for Preneed F	l Quarterly Remittance
Common Tasks	ıbmittəl	Select a Citation I	Invoice for Pre	need Quarterly R reneed Quarterl	emittanœ. Click "Nex y Remittance	t" to continue.
(1 - current outsta	nding)	Invoice Date	e Quarter Ye	ar Invoice Number	Invoice Due Date	Туре
Review Paid/I submissions	Final	05/15/2018	Q3 201	.7 Q32017-9425	07/14/2018	Late Addendum
Other Places eAppoint work Apply for a PS License & Init Appointment 	doench GA ial				spute Cancel	Back Next

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.

	MY PATRONIS	ANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
САРРО	NINT			Citati	on Dispute
Common Tasks • Start a new si (1 - current outsta • Review Paid/ submissions	• You ubmittal anding) 'Final	ır Citation dispute ha	s been submitted su	ccessfully.	Done
Other Places					
eAppoint work Apply for a PS License & Init Appointment	kbench 5A tial				

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.

	MY PATE RIDA'S CH	RONIS				
Home	He	lp	Contact Us	My Account	DFS Home	Logout
САРРС	ÎNT	Select t	he type of submittal y	you want to start. Cl	Select Subn	nittal Type
Start a new si (3 - current outstate Review Paid/ submissions	ubmittal anding) Final	Select	type of submittal / Appointments ew Appointments			
Other Places		OTerr	minate Appointments	•		
eAppoint worl (2 - current outsta	kbench anding)	O Prei	need Quarterly Rem	ittance ittance Addendums		
Apply for a PS License & Init Appointment	5A iial		ment for Preneed Q	uarterly Remittance	Citations (2 - current	outstanding)
		Add	endums required as	result of financial e	xamination (1 - correc	nt outs tanding)
					Cancel	Back Next

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.

	MY PATRON	IS INANCIAL OFFI	CER					
Home	Help	Contact U	Js	Му Ассо	unt	DFS Hom	e	Logout
САРРС	ÎNT	Adden	ndums	requ	uired	as resu	ilt of exa	f financial amination
Common Tasks	Se	lect Examination I	nvoice					
		Invoice Date	Quarter	Year	Invoice	Number	Invoice	e Due Date
Start a new s	ubmittal	06/01/2018	Q2	2017	Q22017	-8686	07/31/2	2018
Review Paid/ submissions	Final				-	Car	ncel	Back Next
Other Places eAppoint work 	kbench							/
(2 - current outsta • Apply for a PS License & Init Appointment	anding) 5A ial							

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

	MY PATE RIDA'S CH	RONIS	NCIAL OFFICER			
Home	He	lp	Contact Us	My Account	DFS Home	Logout
САРРО	ÎNT			N	ew Submitt	al Created
Common Tasks		A new s	submittal has been s	started, as indicated	below.	
• Start a new su (2 - current outsta	ubmittal anding)		Submittal Type: Ad Date Created: 6/1	dendums required as 1/2018 09:51:37 AM	result of financial ex	amination
• Review Paid/ submissions	Final	You car optiona naming busines	n give this submittal a II. Most Preeneed Bu submittals, that are ss. For more info on r	a name in the block b siness Licensees dev meaningful for them naming a submittal, d	elow. Naming the su elop their own interr given the way they lick on the HELP tab	bmittal is nal protocols for run their above.
Other Places		S	Submittal Name <mark>:</mark> 20	17_Q2_examination		Done
eAppoint worl (3 - current outsta	kbench anding)					
Apply for a PS License & Init Appointment	5A tial					

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

	Y PATRONIS DA'S CHIEF FIN	ANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
САРРО	ÎNT			Main	Workbench
Common Tasks • Start a new sul (2 - current outstan • Review Paid/Fi submissions	bmittal binal binal begive beg	is a list of submittals y tal, it is induded below int to delete any listed in a screen from which NG: This website uses ections regarding you ist disable or tum-off within your web brow	ou have created bu v. Click on any liste d submittal, dick on h to choose which s s pop-up messages r submittal to the F your pop-up blocke vser in order to vier	It not yet completed. d submittal, to open a DELETE SUBMITTAL b ubmittal to delete. to inform you of impo lorida Department of r for this website if you w these important me	If you just opened a and work on it. If welow, and you will ortant information Financial Services. ou are using such a assages.
Other Places	Paym	ent / Submittal requi	red on		Data Grand
eAppoint workd (3 - current outstan	ding)	dums required as result al examination	of 2017_Q2	_examina ORIGINA	L 6/1/2018 09:51:37 AM
Apply for a PS/ License & Initia	A Termi	nate Appointments	p ra ctice	ORIGINA	L 2/2/2015 02:07:34 PM
Appointment	New A	op ointments	Carol Ta	ylor Block OR IGINA	L 8/4/2010 03:32:13 PM
				D	elete Submittal

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

		ANCIAL OFFICER			
Home	Help	Contact Us	My Account	DFS Home	Logout
CAPPOIN	т	Addendu	ms required	l as result o ex	of financial camination
Common Tasks	Submit	tal Type: Addendums re Created: 6/7/2018 03:4	equired as result of final	ncial examination	
Start a new submi (8 - current outstanding	Submitt	al Name: 2017_Q2_exa	mination ittal Name		
• Review Paid/Fina submissions	Listed b compor current	pelow are all the com nent, click on its name details of your submi	ponents required to s . Your changes are a ttal, dick "Review this	submit this submittal utomatically saved. s Submittal".	. To view a To review the
Other Blaces					
Other Places	Comp	onent	Last Updated	Submission Status	Payment Status
eAppoint workben (3 - current outstanding Apply for a DSA	ach a) Prene Exami	ed Quarterly Remittar nation	6/7/2018 03:42:32 PM	Incomplete	Incomplete
License & Initial Appointment				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

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.

Home	Help	Contact	Us N	ty Account	DFS F	lome	Logout
CAPPOIN	т	Adde	ndums	requir	ed as re	sult of fi exam	nancial ination
rmon Tasks		DO NOT INC	LUDE CONTI	RACTS THAT	ONLY INVO	LVE BURIAL RI	GHTS
tart a new submi	ttal fee	ot reported in fu citation to the lis	l by 5:00 PM o ted preneed	on JULY 31, quarterly re	2018, the Dep mittance invoi	artment will ass ce.	ess a late
eview Paid/Fina ubmissions	Inv	oice Number:	Q22017-868	5 Qua	rter: Q2	Year: 2017	
er Places					Reported	Adjusted Total Counts	Adjusted Amounts
Appoint workben	ch 1	Number of cor other institution	ntracts assign	ed from	0	0	0
pply for a PSA icense & Initial ppointment	2.	Number of cor during calend	tracts entere ar year; lines	d into 3 + 4:	14	16	2
Anes .	3.	Number of written an	Trust Fund o d sold by you	contracts	0	0	0
	4.	Number of contracts you:	Insurance F written and s	unded old by	14	16	2
	5.	Number of cor and cancelled the date of ex contract:	ntracts sold b within 30 da ecution of the	y you ys after	0	0	0
	6.	Total contra where remi lines (3 + 4	acts writte ttance is d) - 5:	n ue;	14	16	2
	7.	Consumer Pro Remittance du	tection Trust e (\$1 per co	Fund ntract):			\$2.00
	8.	Regulatory Tr due (\$6 per c	ust Fund Rem ontract):	ittance			\$12.00
	9.	Current total a	vailable crea	lit			\$70.00
	10	. Total Amou lines (7 + 8	nt Due; 5) - 9:				\$0.00
	11.	Total available submission:	e credit after				> \$56.00

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.

Home Hel	lp Contact Us	My Account	DFS Ho	me	Logout
	Addendu	ıms required	l as res	ult of fi exam	nancial ination
Common Tasks • Start a new submittal	DO NOT INCLUDE If not reported in full by 5: late fee citation to the liste	CONTRACTS THAT O 00 PM on OCTOBER 8, 2d preneed quarterly r	NLY INVOLV 2018, the De emittance inv	E BURIAL RIC	GHTS assess a
(4 - current outstanding) • Review Paid/Final submissions	Invoice Number: Q1203	17-9427 Quarte	r:Q1 Y	'ear: 2017	
Other Places		1	Reported	Adjusted Total Counts	Adjusted Amounts
eAppoint workbench (5 - current outstanding)	1 Number of contracts other institutions:	assigned from	0	0	0
Apply for a PSA License & Initial Appointment	2. Number of contracts during Quarter 1; lin	entered into 1es 3 + 4:	2	17	15
	3. Number of Trust entered into duri	Fund contracts	0	15	15
	4. Number of Insur contracts entered Quarter 1:	ance Funded d into during	2	2	0
	 Number of contracts and cancelled within the date of execution contract: 	sold by you 30 days after n of the	0	0	0
	6. Total contracts w where remittanc lines (3 + 4) - 5	vritten :e is due; :	2	17	15
	7. Consumer Protection Remittance due (\$1	n Trust Fund per contract):			\$15.00
	8. Regulatory Trust Fun due (\$6 per contract	nd Remittance t):			\$90.00
	9. Current total availab	ole credit:		<u> </u>	\$21.00
	10. Total Amount Du lines (7 + 8) - 9	ie; :		(\$84.00
	11. Total available credi submission:	it after	L		\$0.00

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.

Home	Hel	p	Contact Us	My Acc	count DFS	Home	Logout
CAPPOIN	лт			De	elete Subn	nittal \	Workbenc
Common Tasks Start a new subm (7 - current outstandin	nittal 19)	DELETE S CANCEL t	ELECTED SUBMITTA o return to your Ma	L. If you do in submitta pop-up me r submittal	 not want to delete I Workbench. essages to inform y to the Florida Depi 	e any subm rou of impo	rtant information
 Review Paid/Fina submissions 	al	You must feature w	disable or turn-off ithin your web brow	your pop-up vser in orde	p blocker for this w ar to view these im	ebsite if yo portant me	u are using such a issages.
Review Paid/Fina submissions Other Places	al	Payment Delete?	disable or turn-off ithin your web brow : / Submittal requir Type	your pop-up vser in orde red on	blocker for this w ar to view these im	ebsite if yo portant me Type	u are using such a ssages. Date Created
Review Paid/Fina submissions Other Places eAppoint workber (5- orget outlands)	al nch	Payment	disable or turn-off ithin your web brow : / Submittal requir Type Preneed Quarterly Re Addendum s	your pop-up vser in orde red on emittance	Name test2	ebsite if yo portant me Type ORIGINAL	Date Created 6/1/2018 01: 57: 11 PM
Review Paid/Finasubmissions Other Places eAppoint workber (5 - current outstandin Apply for a PSA History 9 A PSA	nch 19)	Payment Delete?	disable or turn-off ithin your web brow : / Submittal requin Type Preneed Quarterly Re Addendums Preneed Quarterly Re Addendums	your pop-up vser in order red on emittance emittance	Name test2 2017_Q4_Addendu	ebsite if yo portant me Type CRIGIN4L ORIGIN4L	U are using such a ssages. Date Created 6/1/2018 01: 57: 1 PM 6/1/2018 12: 08: 1 PM
 Review Paid/Finasubmissions Other Places eAppoint workbear (5 - current outstanding) Apply for a PSA License & Initial Appointment 	nch 19)	Payment Payment Delete?	disable or turn-off ithin your web brow / Submittal requin Type Preneed Quarterly Re Addendum s Preneed Quarterly Re Addendum s Preneed Quarterly Re Addendum s	your pop-up vser in order red on emittance emittance emittance	Name test2 2017_Q4_Addendu	ebsite if yo portant me Type ORIGINAL ORIGINAL	Date Created 6/1/2018 01: 57: 11 PM 6/1/2018 12: 08: 11 PM 6/1/2018 12: 06: 51 PM
 Review Paid/Finasubmissions Other Places eAppoint workbear (5 - current outstanding) Apply for a PSA License & Initial Appointment 	nch 19)	Payment Payment Delete?	disable or turn-off ithin your web brow / Submittal requir Type Preneed Quarterly Re Addendums Preneed Quarterly Re Addendums Preneed Quarterly Re Addendums New Appointments	your pop-up vser in order red on emittance emittance emittance	Name test2 2017_Q4_Addendu Jeff Haney	ebsite if yo portant me Type ORIGINAL ORIGINAL ORIGINAL	Date Created 6/1/2018 01: 57: 1 PM 6/1/2018 12: 08: 1 PM 6/1/2018 12: 06: 5 PM 8/2/2007 12: 53: 3 PM
 Review Paid/Finasubmissions Other Places eAppoint workbear (5 - current outstanding) Apply for a PSA License & Initial Appointment 	nch 9)	Payment Payment Payment Delete?	disable or turn-off ithin your web brow / Submittal requir Type Preneed Quarterly Re Addendums Preneed Quarterly Re Addendums Preneed Quarterly Re Addendums New Appointments New Appointments	your pop-up vser in order red on emittance emittance emittance	Name test2 2017_Q4_Addendu Jeff Haney	ebsite if yo portant me ORIGINAL ORIGINAL ORIGINAL ORIGINAL	Date Created 6/1/2018 01: 57: 11 PM 6/1/2018 12: 08: 11 PM 6/1/2018 12: 06: 51 PM 8/2/2007 12: 53: 31 PM 2/14/2006 01: 45: 28 PM

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.

		Contact Us	My Account D	FS Home	Logout
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3. On the Preneed Quarterly Remittance Addendum screen, click the Edit Submittal Name button.

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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 be updated.

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