



Jimmy Patronis, Chief Financial Officer
Florida Department of Financial Services
 Division of Funeral, Cemetery, and Consumer Services
 200 East Gaines Street
 Tallahassee, Florida 32399-0361

PRENEED SALES AGENT (PSA) ONLINE RENEWAL

This form provides the process for Preneed Sales Agent (PSA) appointments that are renewed electronically through the Department's Producer Appointment System (eAppoint). This process is incorporated by reference in Rule 69K-5.011, Florida Administrative Code, which can be accessed using the Division of Funeral, Cemetery, and Consumer Service's web page at: <http://www.myfloridacfo.com/division/funeralcemetery/>.

JIMMY PATRONIS
 FLORIDA'S CHIEF FINANCIAL OFFICER

Home
Help
Contact Us
My Account
DFS Home
Logout

Common Tasks

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

Log on to the Industry Portal

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

WARNING: You are currently using a browser that is not compatible with this web site. This site is designed for use with Internet Explorer version 5.5 or version 6.x. If you do not have a browser of these versions, please [click here](#).

User Name:

Password:

JIMMY PATRONIS
 FLORIDA'S CHIEF FINANCIAL OFFICER

Home
Help
Contact Us
My Account
DFS Home
Logout

Common Tasks

- **Start a new submittal**
- Review submissions

Other Places

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

Appointing Entity Info

eAppoint

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

Refund Policy fo Preneed Sales Agent Appointment-Related Submission

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

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

Choose a Task

Start a new submittal

Work on an in-progress submittal

Review submissions



Start a new submittal

Common Tasks

- Start a new submittal
- Review submissions

Other Places

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

Appointing Entity Info

Welcome to the eAppoint Wizard

The following screen will ask you to select what type of "Submittal" you want to start. There are 3 types of Submittals: New Appointment Submittals, Terminate Appointments Submittals, and Renewal Submittals. 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



Select Submittal Type

Common Tasks

- Start a new submittal
- Review submissions

Other Places

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

Appointing Entity Info

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

Select type of submittal

- New Appointments
- Renew Appointments
- Terminate Appointments

Cancel

Back

Next

eAPPOINT

Common Tasks

- Start a new submittal
- Review submissions

Other Places

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

Appointing Entity Info

Select Renewal Invoice

Select renewal invoice. Click "Next" to continue.

Select Renewal Invoice

	Invoice Date	Invoice Number	Invoice Amount
<input checked="" type="radio"/>			
<input type="radio"/>			

eAPPOINT

Common Tasks

- Start a new submittal
- Review submissions

Other Places

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

Appointing Entity Info

New Submittal Created

A new Submittal has been started, as indicated below.

Submittal Type: Renew Appointments
Date Created: 8/1/2017 10:24:33 AM

You can give this Submittal a name in the block below. Naming the submittal is optional. Most Preeneed 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:



MAIN WORKBENCH

Common Tasks

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

Other Places

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

Appointing Entity Info

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

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

Choose a submittal to work on

Type	Name	Type	Date Created
New Appointments	test	ORIGINAL	7/12/2010 10:58:18 AM
Terminate Appointments	May 1 term	ORIGINAL	5/13/2013 01:11:15 PM
New Appointments	test	ORIGINAL	7/18/2014 11:56:25 AM
New Appointments	Scott	ORIGINAL	1/14/2015 04:17:30 PM
New Appointments	test	ORIGINAL	8/6/2015 11:03:50 AM
Renew Appointments	July renewal	ORIGINAL	8/1/2017 10:24:33 AM

[Delete Submittal](#)



Renew Appointments

Common Tasks

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

Other Places

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

Submittal Type: Renew Appointments
Date Created: 8/1/2017 10:24:33 AM
Submittal Name: July renewal

[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	Status
Renewal Invoice	8/1/2017 10:24:33 AM	Incomplete

[Return to Main Workbench](#)



Renewal Invoice Data Component

Common Tasks

- Start a new submittal
- Review submissions

Other Places

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

If not paid in full by 5:00 PM EST on September 15, 2017 , the Department will cancel all appointments listed on this invoice.

Invoice Month: July 2017
Invoice ID: 111689
Total Number of Appointments: 43

Total Fees(\$): 10,750.00
Total Paper Processing Fees(\$): 0.00
Total Amount Due(\$): 10,750.00

Licensee Number	Name	DOB	Type Class	Fees(\$)
-----------------	------	-----	------------	----------



Payment Wizard

Common Tasks

- Start a new submittal
- Review submissions

Other Places

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

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

Cancel

Next



Payment Wizard

Common Tasks

- Start a new submittal
- Review submissions

Other Places

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

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

Fee Type	Amount
Renew Appointments Fees	
Total Fees	

[Cancel](#) [Next](#)



Payment Wizard

Common Tasks

- Start a new submittal
- Review submissions

Other Places

- eAppoint workbench
- 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.



I, the person whose name is entered in the signature text field below, certify that I am authorized to submit these appointments renewals on behalf of the Appointing Entity. The Appointing Entity certifies that the Preneed Agent(s) being appointed has been or will be properly trained regarding Preneed Sales prior to being authorized by the Appointing Entity to solicit Preneed Sales on behalf of the Appointing Entity.

Signature:

Business Phone:

Payment Method:

Credit Card eCheck

[Cancel](#) [Next](#)