Agency Locations Requests Search Dashboard Payments

myAgency

A new way to manage your Citizens relationship

User Guide for Agency Principals and their Designees

CITIZENS PROPERTY INSURANCE CORPORATION

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Welcome to myAgency

What Is myAgency?

myAgency provides agency principals (APs) and their designees (APDs) the tools to manage all their administrative needs with Citizens in one system. As part of Citizens' initiative to improve the tools and processes used to manage an agency's relationship with Citizens, myAgency will allow 24/7 online access to oversee agency staff and location(s), request commission statements and book-of-business listings and more.

As the insurer with the largest number of appointed agents in Florida, Citizens will use myAgency to effectively collect, maintain and make information more readily accessible

Who Can Access myAgency?

myAgency was developed specifically for APs and APDs.

What are the Benefits?

myAgency enables APs to manage all their administrative needs with Citizens in one system. It will allow 24/7 online access to view and request changes to the agency staff and location(s), request commission statements and book-of-business listings, and more.

Using myAgency, APs and APDs can:

- Renew agency and agent(s) appointment agreements and pay renewal fees
- Add and deactivate appointed agents and licensed customer representatives (LCRs) to/from our systems and the *Agents* website
- Request view-only credentials for PolicyCenter® for other agency staff members
- Submit requests for specific agency actions or items, such as book-of-business transfers
- Request copies of commission statements and book-of-business listings
- Access, review and download agency-specific communications, policy files and reports that require action.

myAgency will provide contact information for the agency's Citizens Agency Management representative and Agency Field Manager, providing a more consistent experience for users.

Note: APs and APDs have identical rights to myAgency.

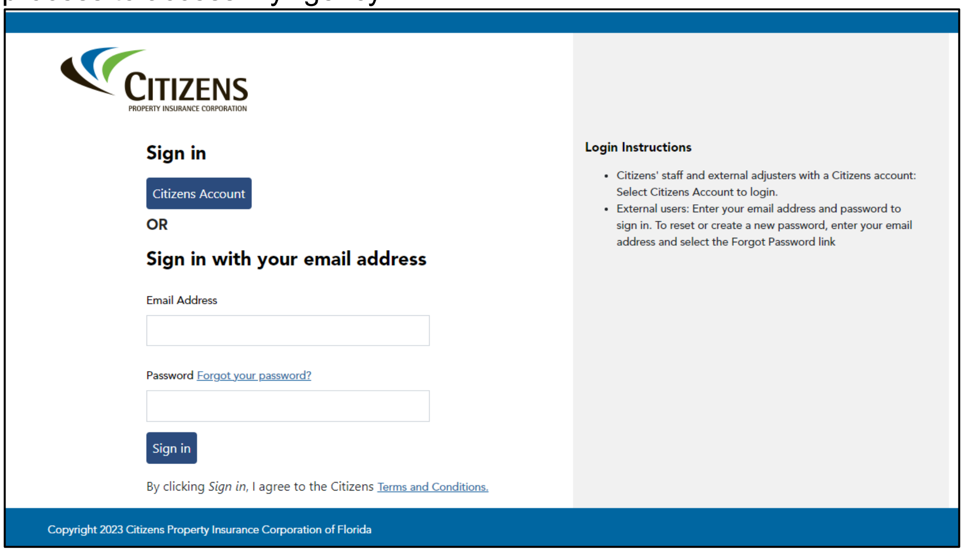
Browser Requirements and Access

Browser Requirements

Citizens recommends the Chrome browser for myAgency. Other browsers will limit functionality.

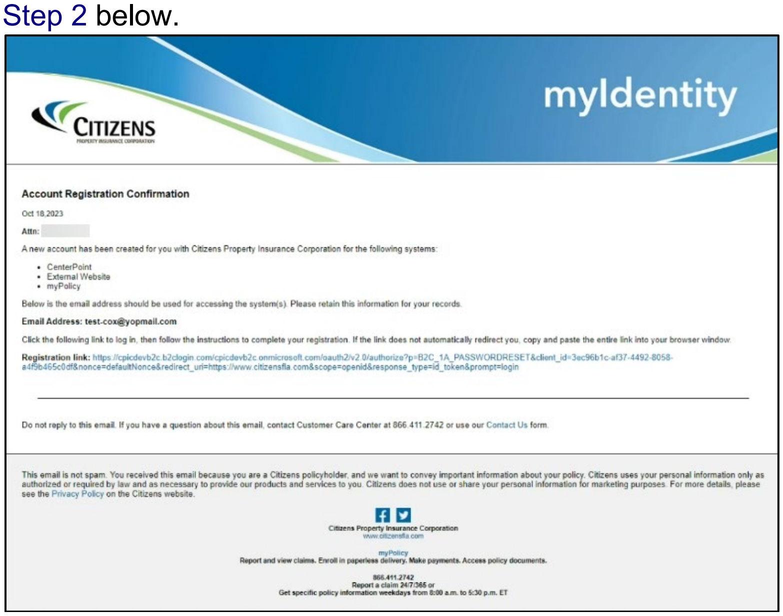
Username and Passwords

APs and APDs use their email address provided during the appointment process to access myAgency.



Establishing New User Password

APs and APDs will receive an email informing them they will be required to create their new password. Select the link in the email, then continue to Step 2 below.



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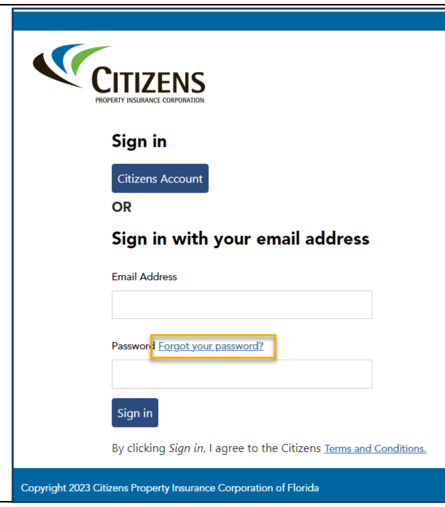
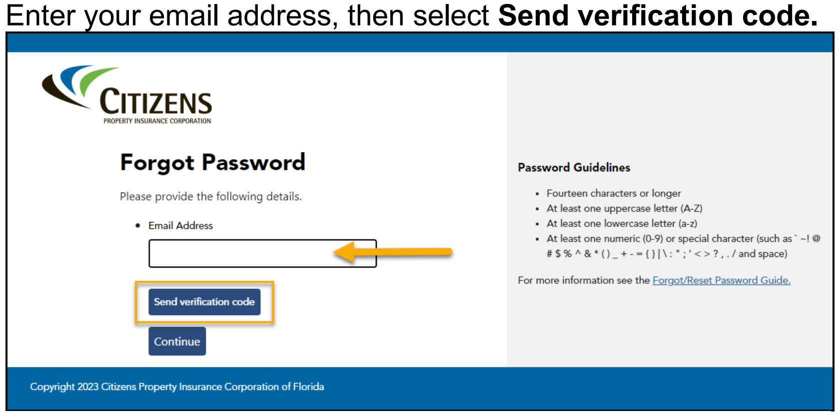
Browser Requirements and Access, Continued

Username and Passwords, continued

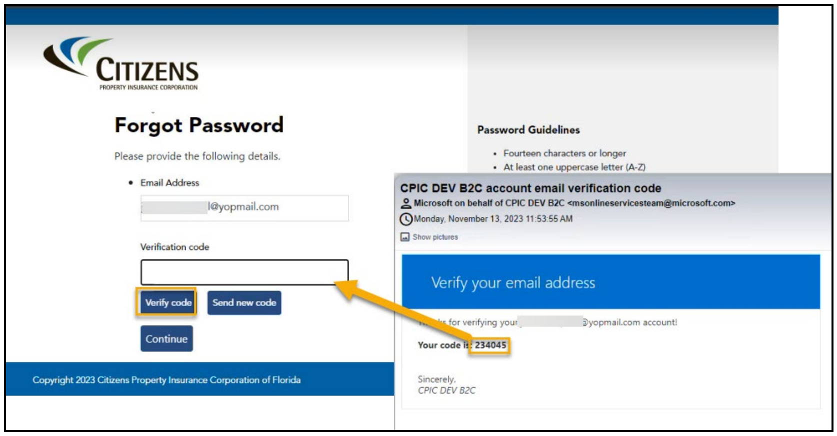
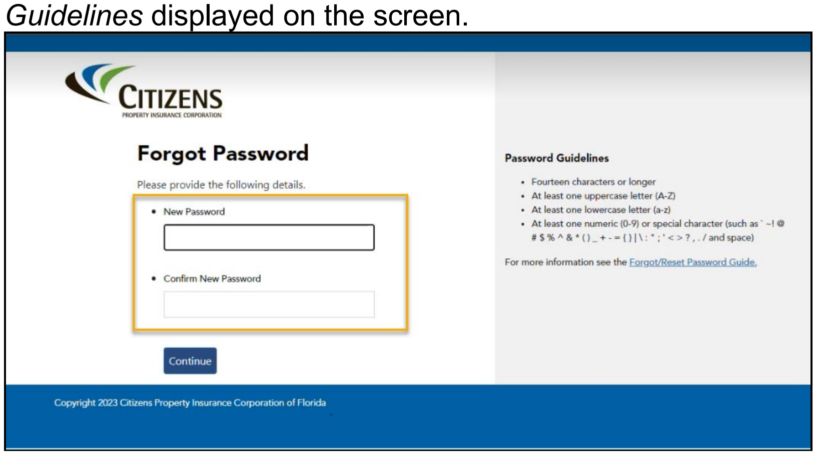
The process for establishing and/or resetting your password are similar.

Step	Action
1	On the login screen, select **Forgot your password?** **Result:** The *Forgot Username/Password* screen displays. 
2	Enter your email address, then select **Send verification code.**  **Result:** The verification code will be sent to your email address.

Continued on next page

Browser Requirements and Access, Continued

Username and Passwords, continued

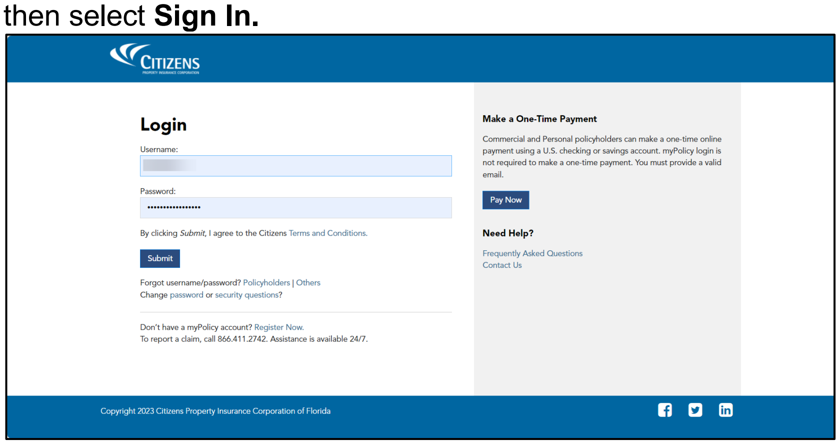
Step	Action
3	Enter the verification code indicated in the email.  *Note:* The email will be sent from *Microsoft on Behalf of CPIC* msonlineserviceteam@microsoft.com. If you do not receive the verification email, check your spam or junk folders.
4	Create and confirm new password using the *Password Guidelines* displayed on the screen.  *Note:* Refer to the Forgot Password Guide for additional information.

Continued on next page

Browser Requirements and Access, Continued

Accessing myAgency

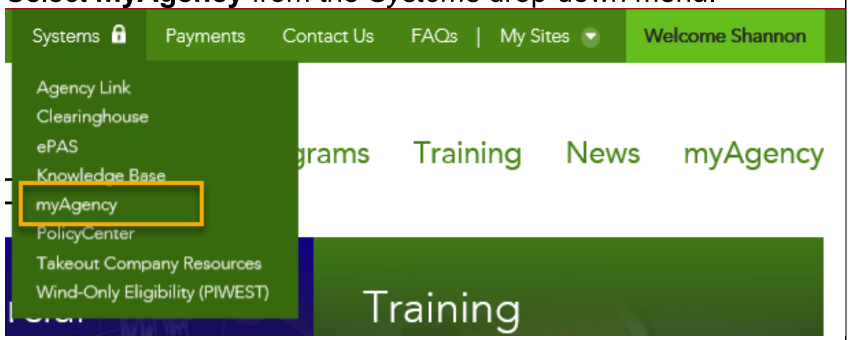
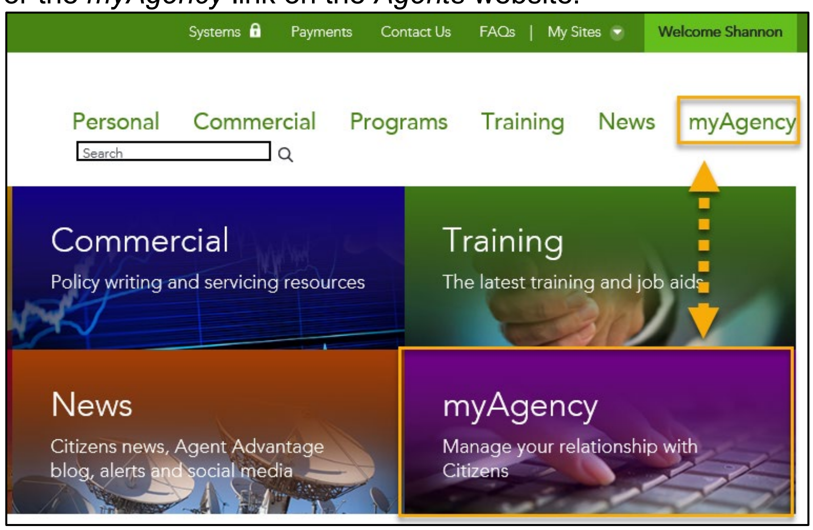
To access myAgency:

Step	Action
1	Access the Citizens website: www.citizensfla.com.
2	Select **Login.**  **Result:** The *Login* screen will appear.
3	Enter your Citizens Access Gateway (CAG) ID and password, then select **Sign In.**  **Result:** The *Agents* website will display. **IMPORTANT:** The myAgency username and password will be different from the website, Citizens Learning Center and PolicyCenter username and password.

Continued on next page

Browser Requirements and Access, Continued

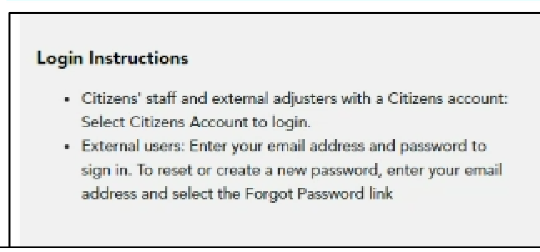
Accessing myAgency, continued

Step	Action
3	Select **myAgency** from the *Systems* drop-down menu.  **Result:** The *Agency* tab displays. *Note:* You also can access myAgency from the *myAgency* tile or the *myAgency* link on the *Agents* website.  **Result**: An additional login screen will display.

Continued on next page

Browser Requirements and Access, Continued

Accessing myAgency, continued

Step	Action
4	myAgency will temporarily require an additional step to login. Use your email address and newly established myAgency-only password to access myAgency, then select **Sign In.**   Login Instructions • Citizens' staff and external adjusters with a Citizens account: Select Citizens Account to login. • External users: Enter your email address and password to sign in. To reset or create a new password, enter your email address and select the Forgot Password link **Important note:** Do not select *Citizens Account.* This is for Citizens staff only. **Result:** myAgency will display.

Basic Navigation

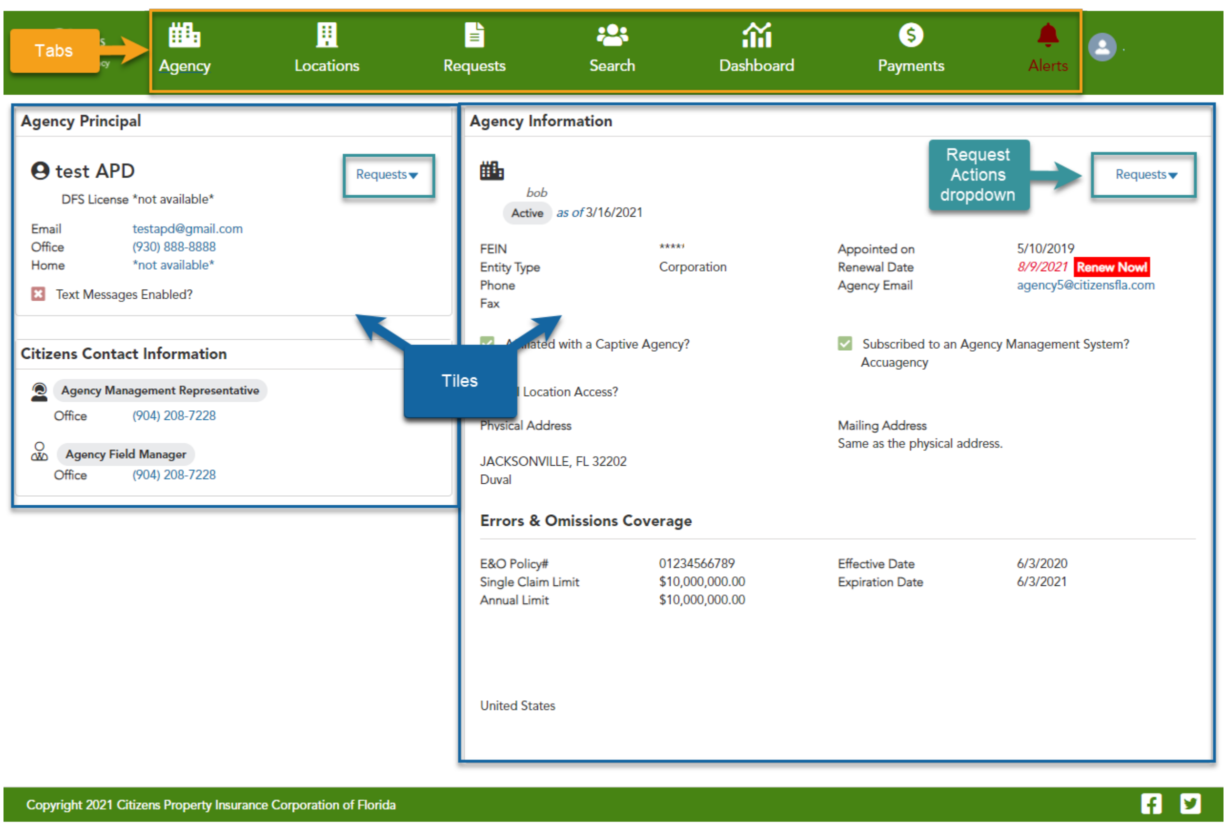
Layout: Tabs and Tiles

myAgency has various tabs to provide important information. The tabs include:

- **Agency:** Manage your agency's relationship with Citizens. Agency renewals are managed from this tab.
- **Locations:** Manage staff appointments and locations
- **Requests:** Track and view submitted requests.
- **Search:** Locate staff records.
- **Dashboard:** Access agency data and performance statistics.
- **Payments:** View payments and balance due.
- **Alerts:** Access action-required policy lists.

Each tab contains:

- **Tiles**: Each tab is grouped into various tiles with specific topics.
- **Request Action drop-down menu**: You can request various requests and changes are submitted from these tiles. The available actions will differ based on the topic of the tile.



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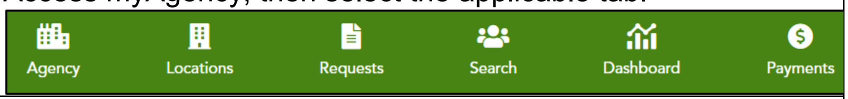
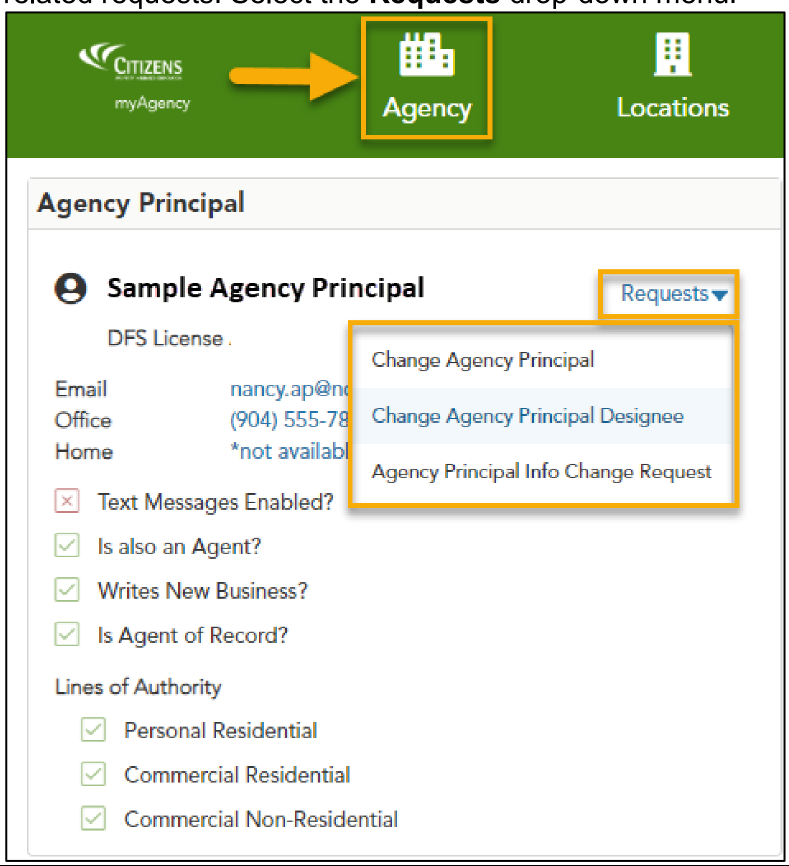
Basic Navigation, Continued

Submitting Requests

All agency management-related requests can be submitted from applicable tiles within myAgency. Some requests are auto approved, while others require document submission and/or approval/processing from Citizens staff. Banners and additional information applicable to these requests will display. If a request requires additional processing or approval, the AP or APD will receive an email confirming the final status of the request.

Note: The Site Map contains a list of all available requests.

To submit any request:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access myAgency, then select the applicable tab.

</td></tr>
<tr><td>2</td><td>Most tiles display a Requests drop-down menu to access related requests. Select the Requests drop-down menu.

</td></tr>
</table>

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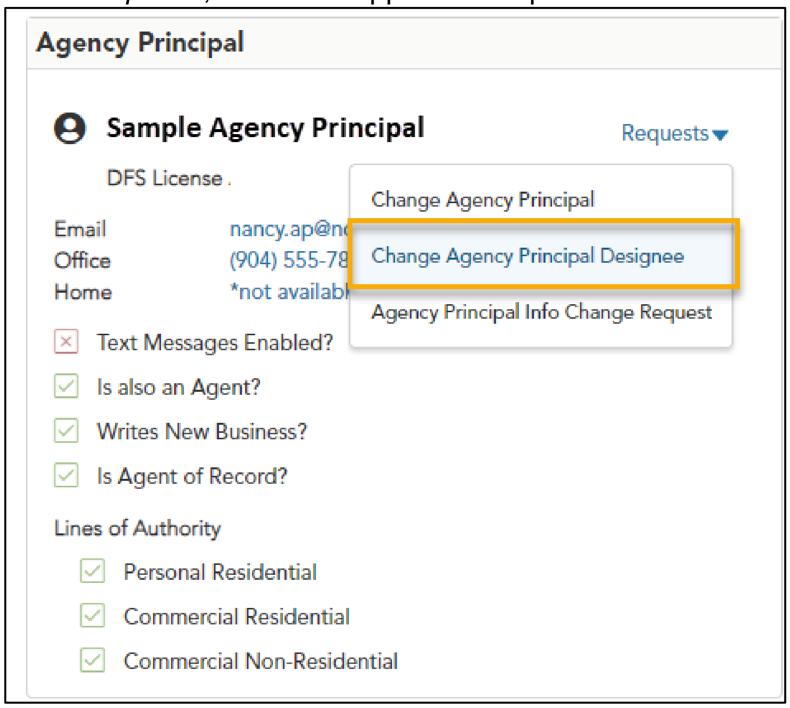
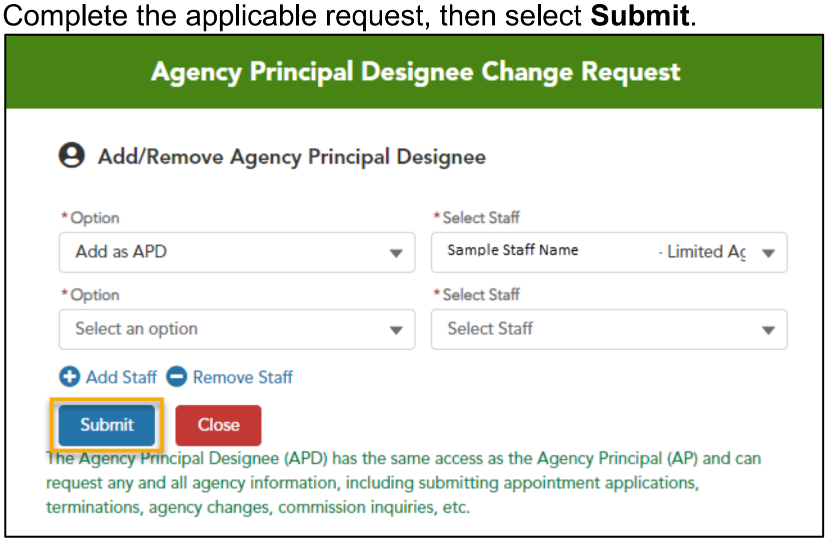
Basic Navigation, Continued

Submitting Requests, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>From Requests, select the applicable request.



Result: The applicable request screen will display.</td></tr>
<tr><td>4</td><td>Complete the applicable request, then select Submit.



Result: A confirmation banner will appear after any request is successfully submitted.</td></tr>
</table>

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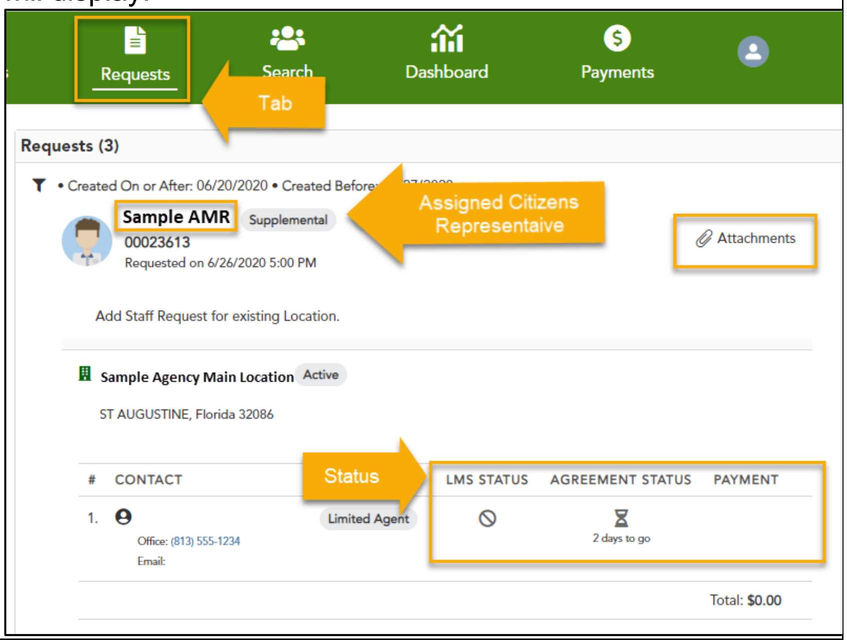
Basic Navigation, Continued

Submitting Requests, continued

Step	Action
5	To confirm the status of any submitted change, select the **Requests** tab. The request, any uploaded files and the assigned Citizens' contact will display. *Note:* If the request is auto approved, the AP's or APD's name will display.



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Basic Navigation, Continued

Site Map Use the site map below to assist with myAgency navigation:

Tab	Function	Tiles	Actions
Agency	Manage agency and agency principal information.	Agency Principal	• Change Agency Principal • Change Agency Principal Designee • Agency Principal Info Change Request
		Citizens Contact Information	View assigned Citizens representatives
		Agency Information and Errors & Omissions Coverage Information	• Agency Information Update • E&O Information Update • Name/DBA/TIN Information Update • Buy/Sell/Transfer Business • Agency Commission Inquiry • Electronic Payment Information Update • Password Reset Request • General Inquiry
Locations	View and manage staff appointments and location details	Agency Locations	• View Locations • Add Location
		Staff	• Add Staff
		Staff Member Details	• Staff Information Change Request • Transfer Staff to a New Location • Update Line of Authority • Remove Staff
Requests	Track status of previously submitted requests	Request Filters	N/A
		Requests	N/A
Search	Search and manage staff	Contact Filters	• Staff Information Change Request • Transfer Staff to a New Location • Update Line of Authority • Remove Staff

Continued on next page

Basic Navigation, Continued

Site Map, continued

Tab	Function	Tiles	Actions
Dashboard	Access and/or export agency data about policies in force, new-business submissions, claims, and performance	Policies in Force (book of business)	• Agency’s total policy count • Count by policy form type
		New Business Written in the last 12 months	• Agency’s total new-business policies • Count by policy form type • Count by month
		Claims Filed within the last 36 months	• Agency’s total claim count • Count by month • Count by policy form
		Additional Document Requests	Number of requests for additional documents by: • Activity date • Transaction type • Reason
		Performance Violations	• Number of performance violations received in each category for each month • Running count of performance violations for the agency • Summary of running totals for each performance violation type
Payments	View fees and payments	Pending Payments	• Make payment
		Completed Payments	• View recent payment amounts
		Expired Payments	• View past payment amounts
Alerts	Access action-required policy lists	Alert filters	• Filter alerts by date or status
		Alerts	• Access important policy and/or claim information • Download alert files • Resources and useful links

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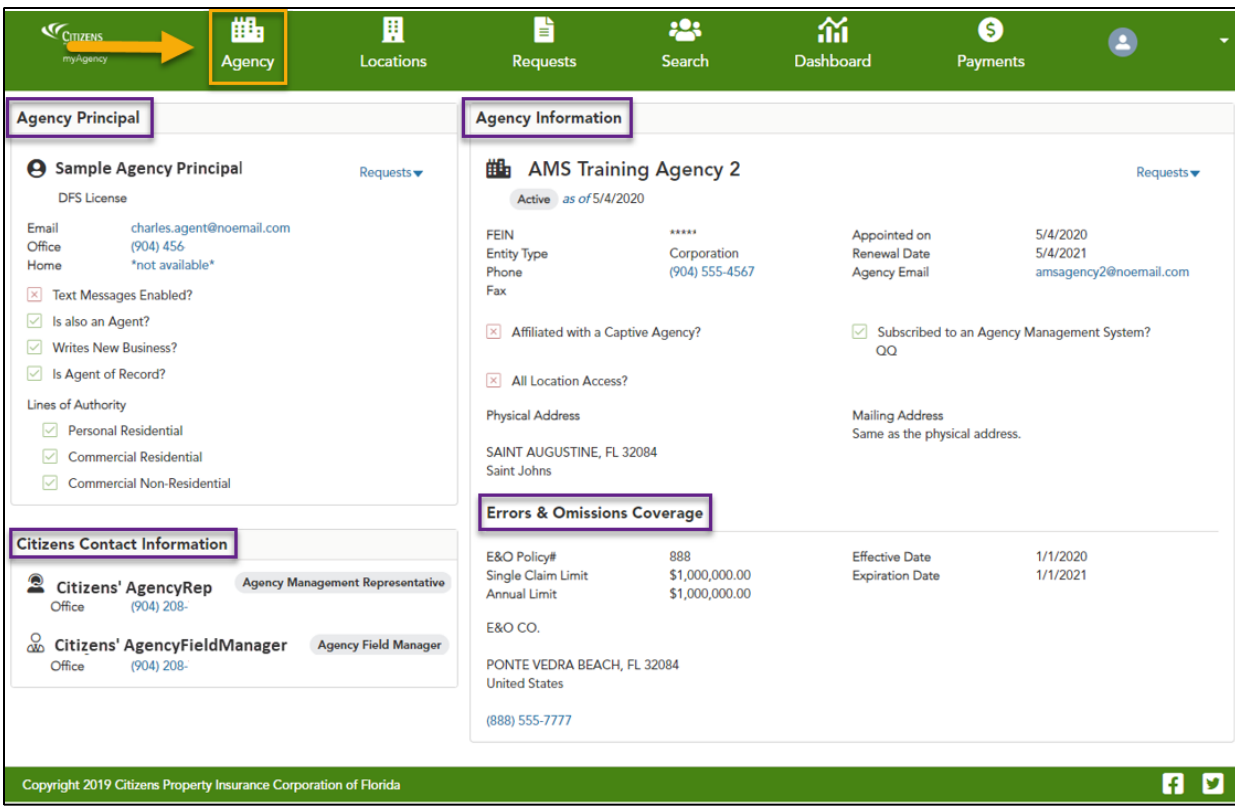
Agency Tab

Function Overview

Manage your agency's relationship with Citizens using the *Agency* tab. Agency renewals are managed from this tab.

The *Agency* tab will appear once logged in to myAgency. The following tiles display:

- *Agency Principal*
- *Citizens Contact Information*
- *Agency Information*
- *Errors & Omissions Coverage*



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Agency Tab, Continued

Agency Principal Tile

The *Agency Principal* tile includes basic AP information, including:

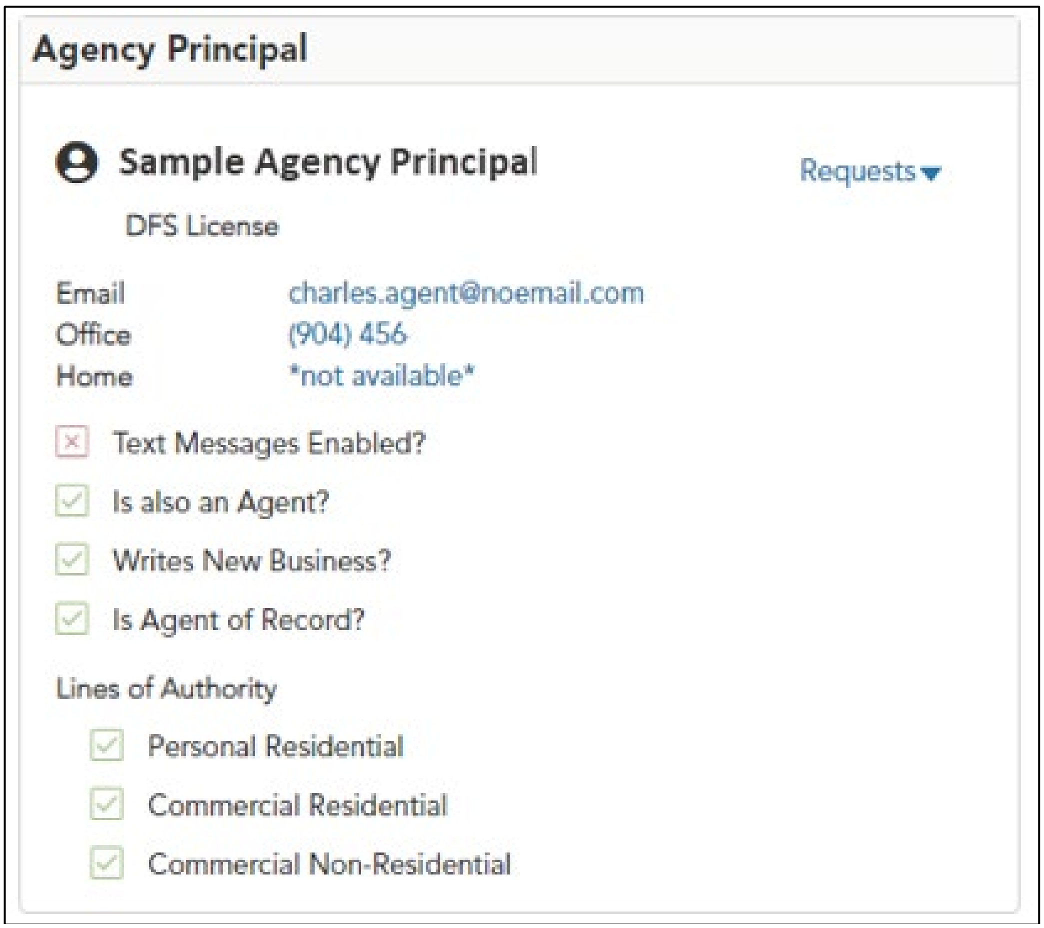
- *Agency Principal Name*
- *DFS License number*
- *Email, office, and home contact information*
- *Lines of Authority*

Additional details about the AP also display, including:

- *Is also an Agent?*
- *Writes New Business?*
- *Is Agent of Record?*

A red X indicates no, a green check mark indicates yes.

To update the information listed above, submit a request.

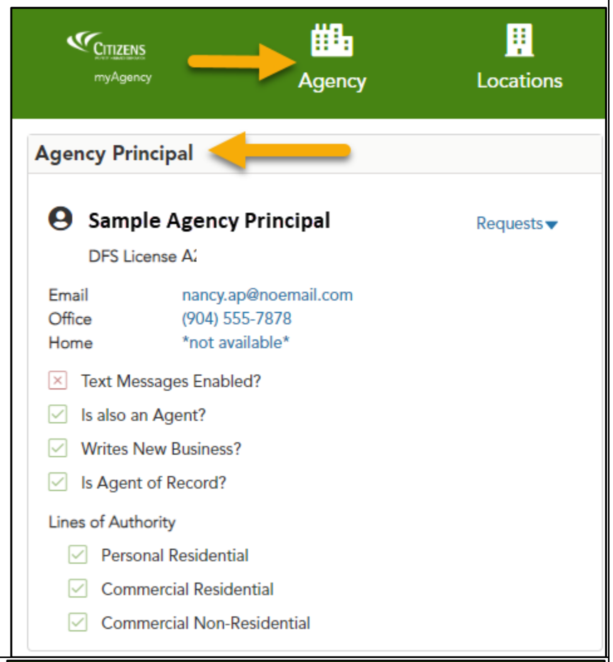
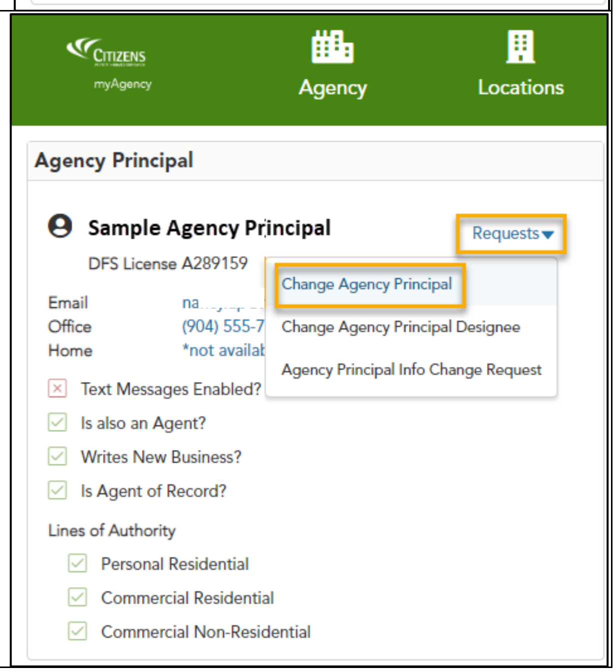


Continued on next page

Agency Tab, Continued

Request: Change Agency Principal

To request a change to the AP:

Step	Action	
1	Access the **Agency** tab, then navigate to the **Agency Principal** tile. *Note:* The new AP must be listed in the *Staff* section in the *Location* tab before submitting a *Change Agency Principal* request.	
2	Select the **Requests** drop-down menu, then select **Change Agency Principal**. **Result:** *Agency Principal Change Request* screen appears.	

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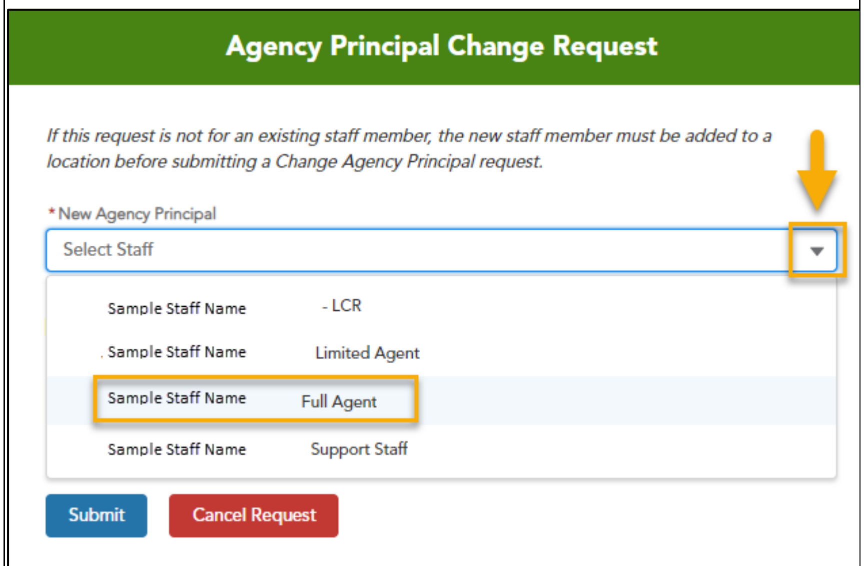
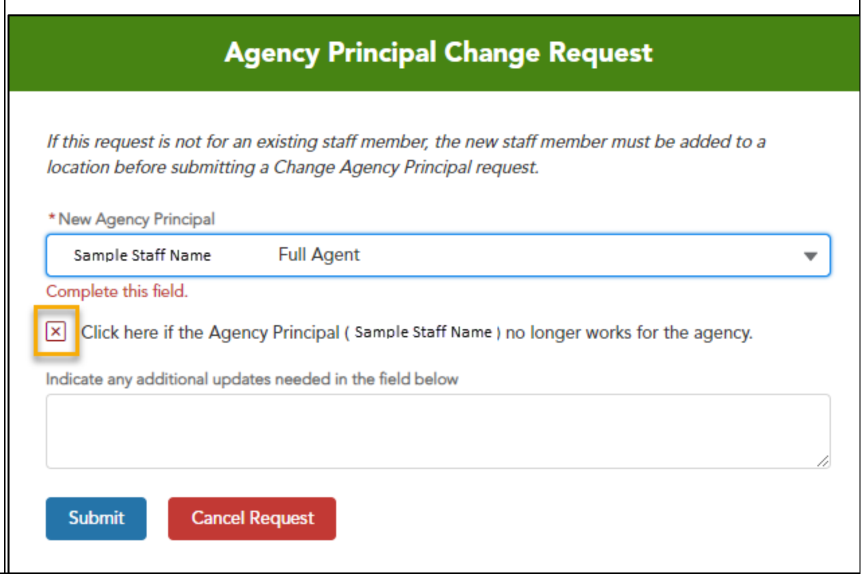
Agency Tab, Continued

Request: Change Agency Principal, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Select the new AP from the Select Staff drop-down menu.


</td></tr>
<tr><td>4</td><td>Indicate if the current AP no longer works for the agency.

Result: If checked, the Agent receiving book of business field will appear.


</td></tr>
</table>

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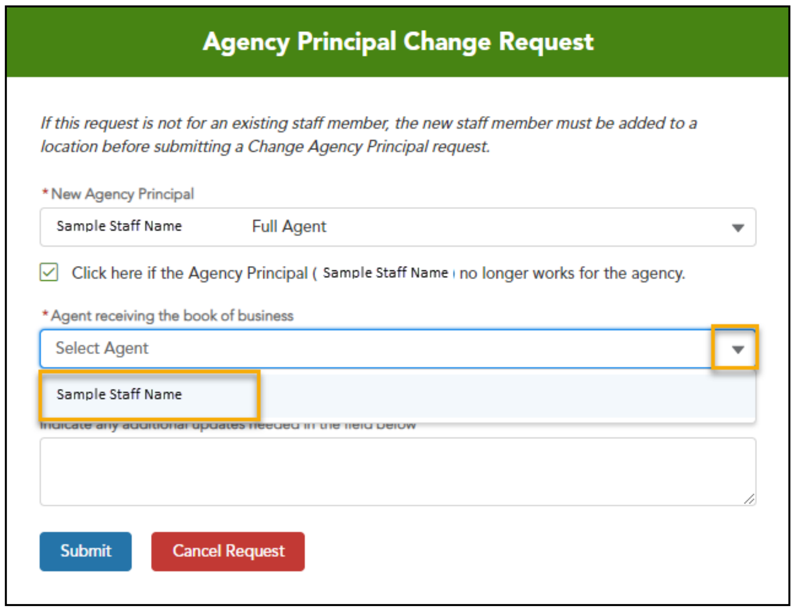
Agency Tab, Continued

Request: Change Agency Principal, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
If applicable, select an eligible staff member to transfer the book of business to.
Indicate if any additional updates are needed, then select Submit.


Result: The new AP must sign a new agency agreement. Citizens will email it to them. Once signed and returned, Citizens will process the request.
</td></tr>
</table>

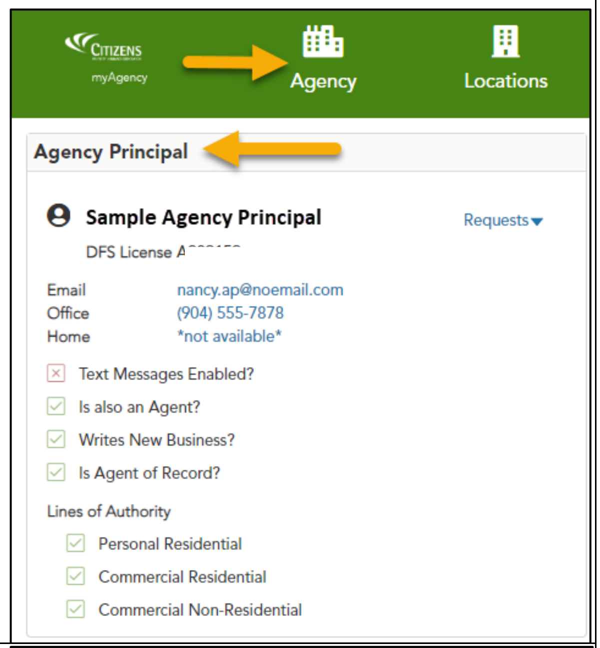
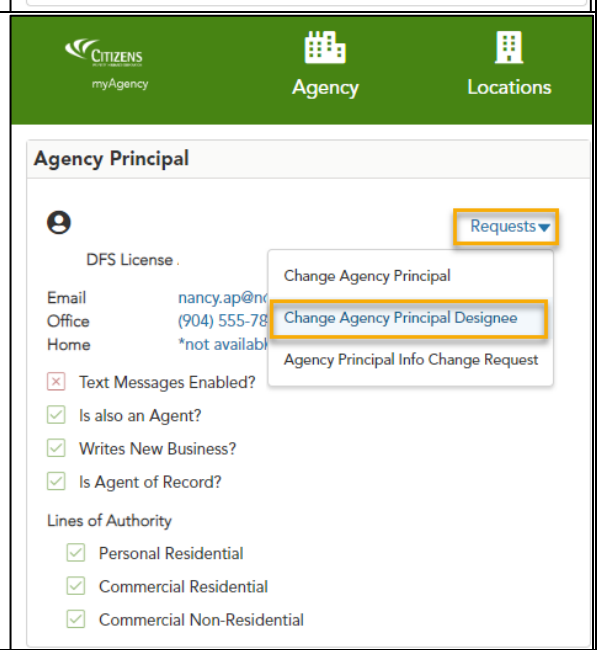
Continued on next page

Agency Tab, Continued

Request: Change Agency Principal Designee

Current staff can be added or removed as an AP designee.

To request a change to the AP designee:

Step	Action	
1	Access the **Agency** tab, then navigate to the **Agency Principal** tile. *Note:* The AP designee must be listed in the *Staff* section on the *Location* tab before submitting an *Agency Principal Designee Change* request.	
2	Select the **Requests** drop-down menu, then select **Change Agency Principal Designee** **Result:** *Agency Principal Designee Change* request screen appears.	

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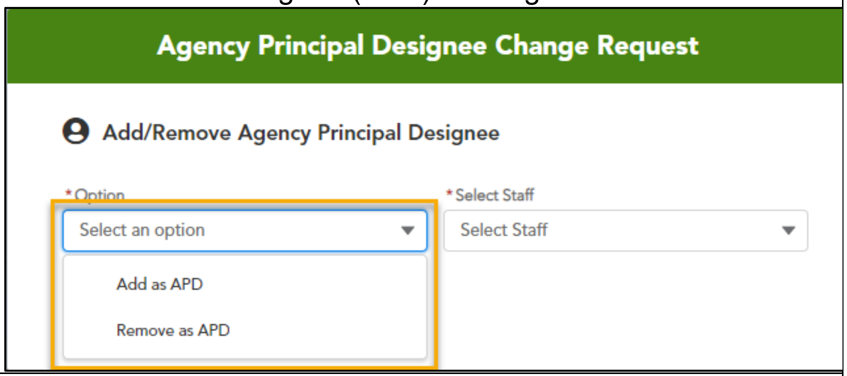
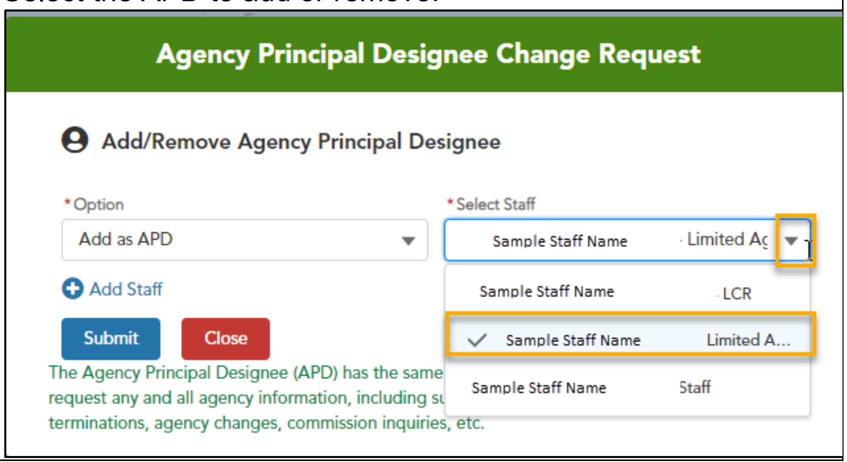
Agency Tab, Continued

Request: Change Agency Principal Designee, continued

Step	Action
3	Indicate if an AP designee (APD) is being added or removed. 
4	Select the APD to add or remove. 

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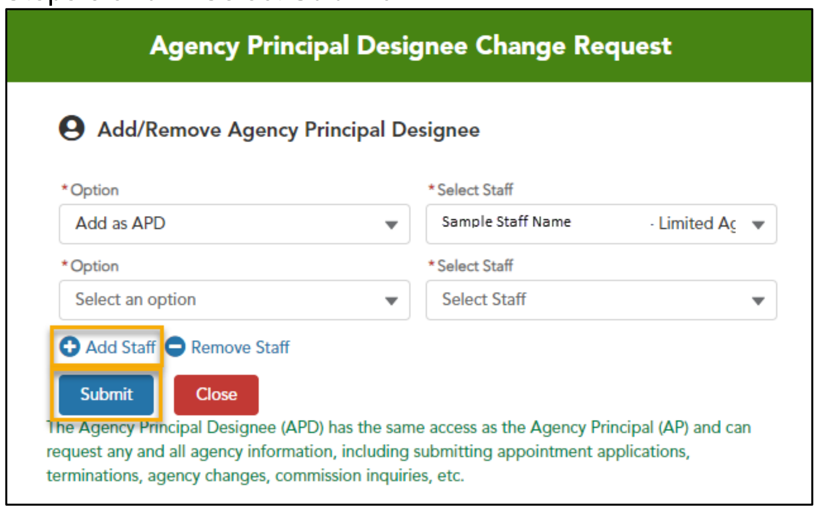
Agency Tab, Continued

Request: Change Agency Principal Designee, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>If additional changes are needed, select Add Staff, then repeat Steps 3 and 4. Select Submit.



Note: Up to five ADP's can be added per request.

Result: A confirmation banner will display, and the status of the request can be viewed on the Requests tab.</td></tr>
</table>

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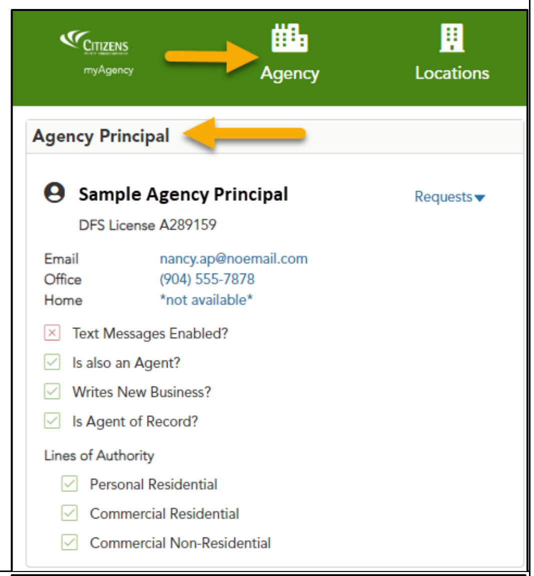
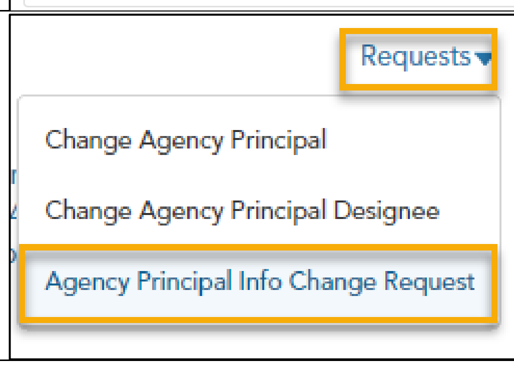
Agency Tab, Continued

Request: Agency Principal Info Change Request

Agency principal information, including phone number, email address, and other information can be updated using the *Agency Principal Info Change* request.

Note: Any name changes will require supporting documentation in order to submit the request.

To change this information:

Step	Action	
1	Access the **Agency** tab, then navigate to the **Agency Principal** tile.	
2	Select the **Requests** drop-down menu, then select **Agency Principal Info Change Request.** **Result:** *Agency Principal Info Change Request* screen appears.	

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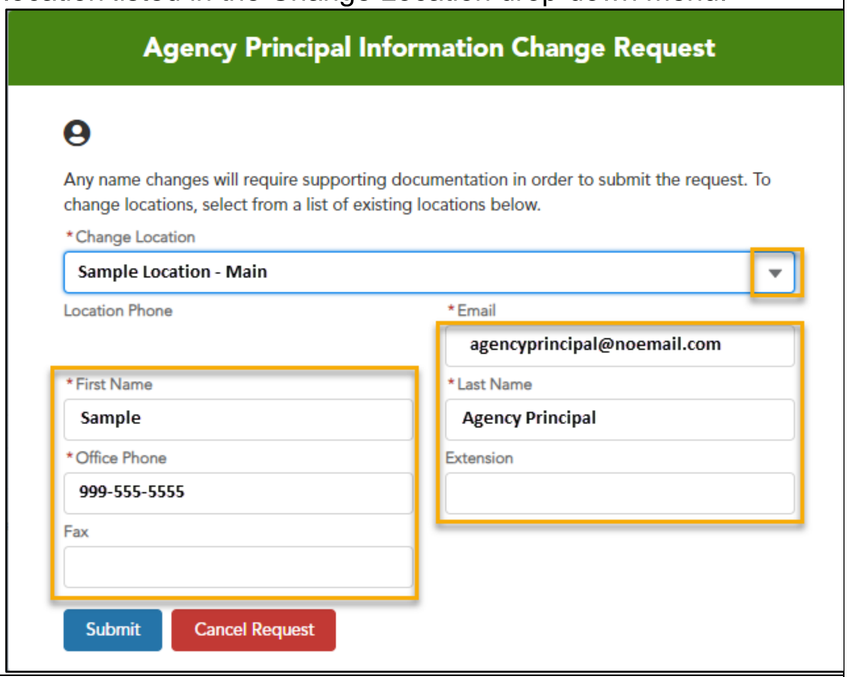
Agency Tab, Continued

Request: Agency Principal Info Change Request, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Information currently on file displays. Select a field to update applicable information.

If the AP's location has changed, select from an existing location listed in the Change Location drop-down menu.

</td></tr>
<tr><td>4</td><td>Select Submit.

Result: A confirmation banner will display, and the status of the request can be viewed on the Requests tab.

</td></tr>
</table>

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***Agency* Tab**, Continued

***Citizens Contact Information* Tile**

To provide a more consistent experience, each agency will be assigned two Citizens contacts to manage their relationship:

- **Agency Management Representative (AMR)** - process administrative requests
- **Agency Field Manager (AFM)** - handle requests for additional education, support, and advocacy

Contact information is listed.

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***Agency* Tab**, Continued

Agency Information Tile

The *Agency Information* tile includes the following information:

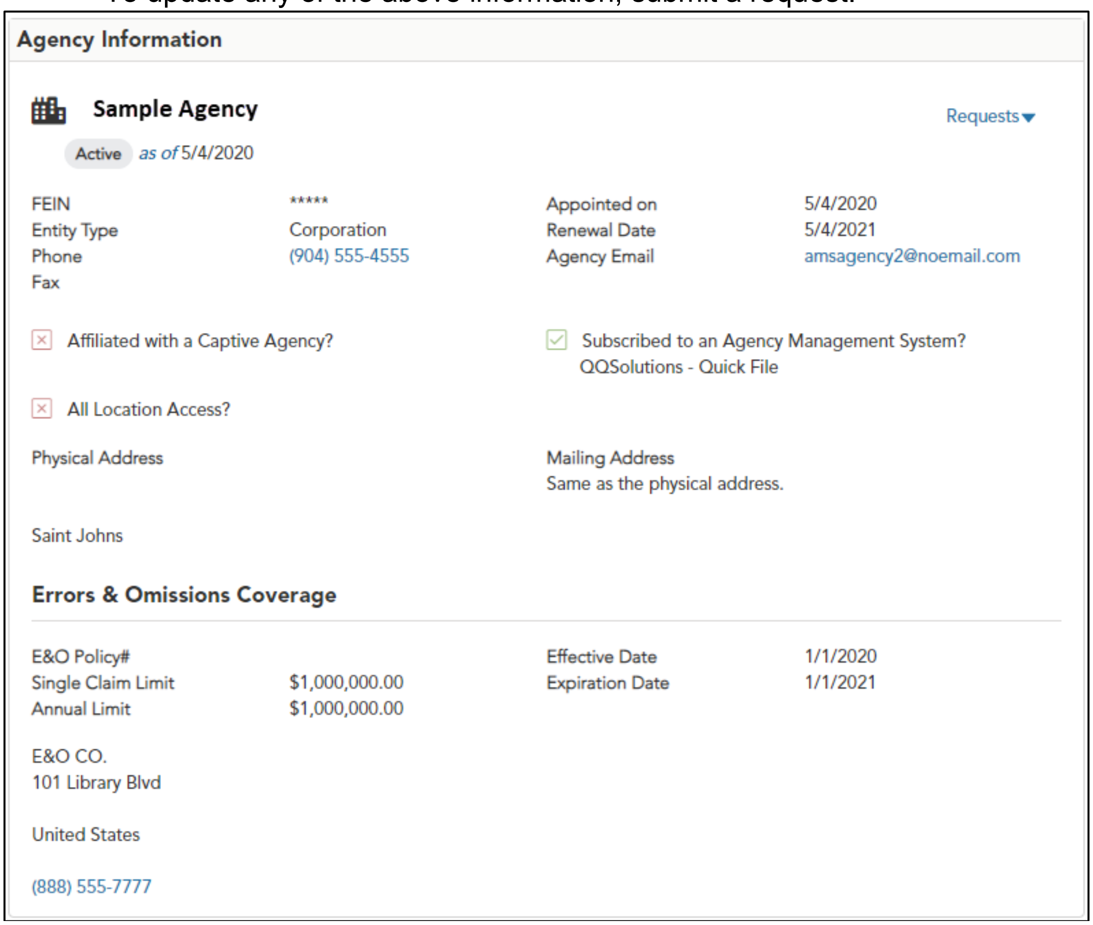
- Agency name
- Last four digits of the FEIN
- Entity type
- Appointment and renewal date
- Phone, fax and email information
- Physical and mailing address
- Errors and Omissions coverage information

In addition, the *Agency Information* tile will indicate if an agency:

- Is affiliated with a captive agency
- Has subscribed to an agency management system
- Has all location access

A red X indicates no, a green check indicates yes.

To update any of the above information, submit a request.



Continued on next page

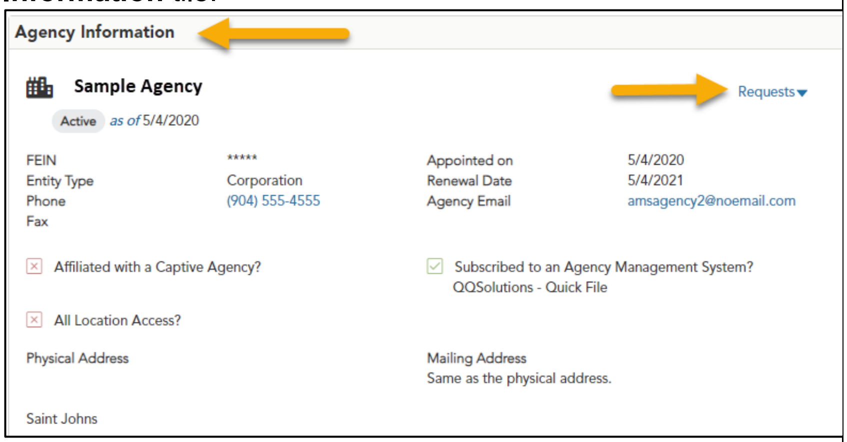
Agency Tab, Continued

Request: Agency Information Update

Use the *Agency Information Update* request when any of the following agency information needs to be updated:

- Agency email address
- Phone number
- Fax
- Captive agency status and affiliation
- Location access
- Mailing and/or physical address

To update any of the above agency information:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Agency tab, then navigate to the Agency Information tile.

</td></tr>
</table>

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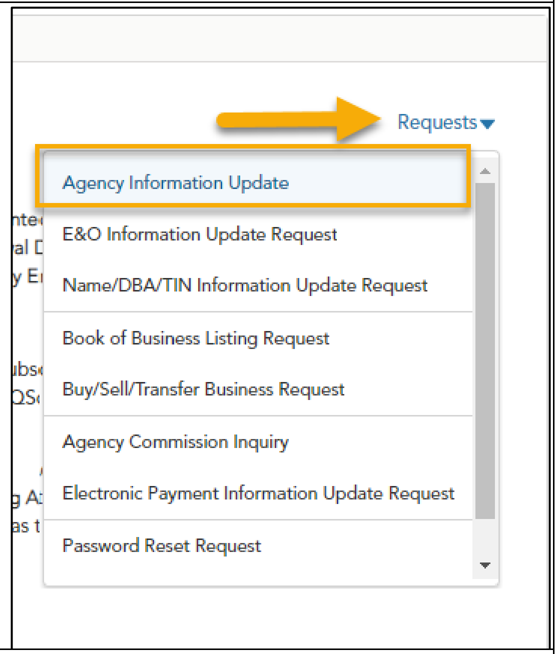
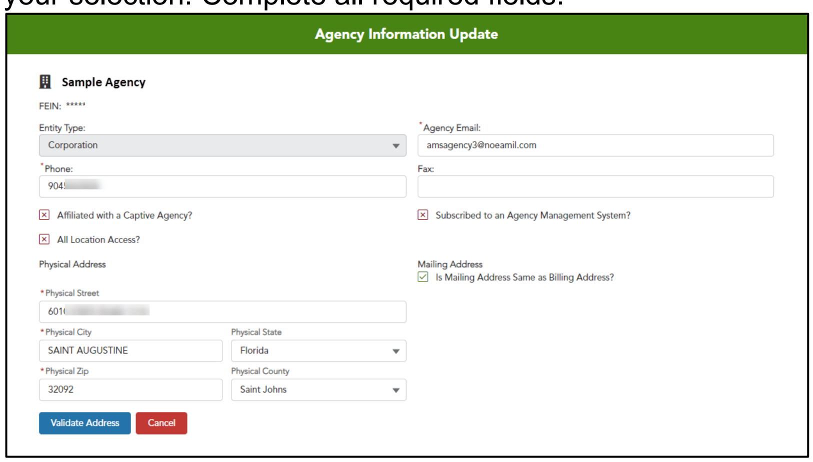
Agency Tab, Continued

Request: Agency Information Update, continued

Step	Action
2	Select the **Requests** drop-down, then select **Agency Information Update.** **Result:** *The Agency Information Update* screen appears. 
3	Select a field to update. Additional fields may appear based on your selection. Complete all required fields.  *Note: Entity Type* must be changed using the Agency Name/TIN request.

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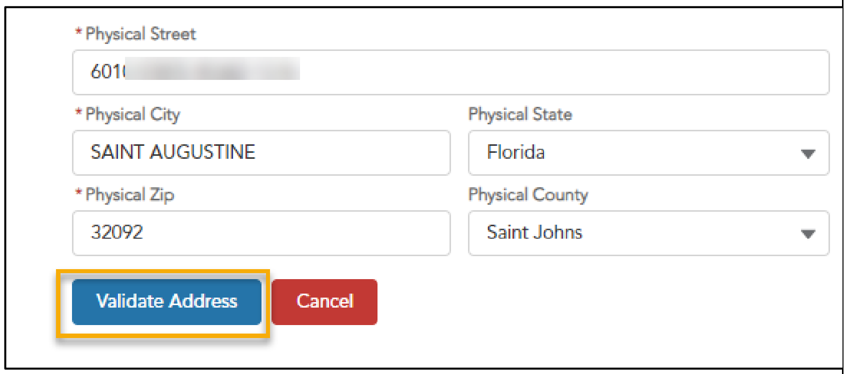
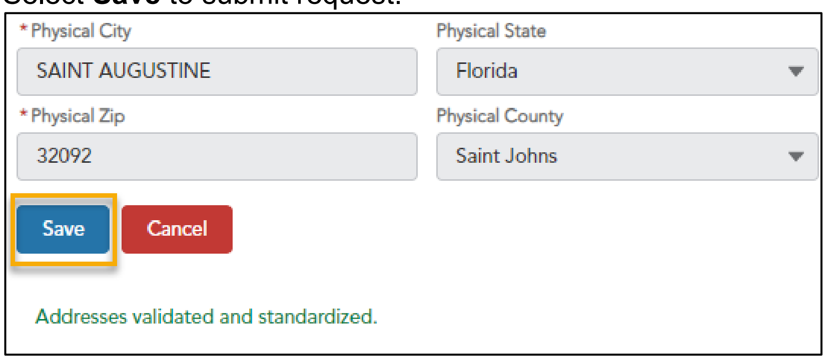
Agency Tab, Continued

Request: Agency Information Update, continued

Step	Action
4	Select **Validate Address.**  *Note:* The address must be standardized, even if no change has been made.] **Result:** Addresses validated and standardized.
5	Select **Save** to submit request.  **Result:** A confirmation banner will display, and the status of the request can be viewed on the *Requests* tab.

Continued on next page

***Agency* Tab**, Continued

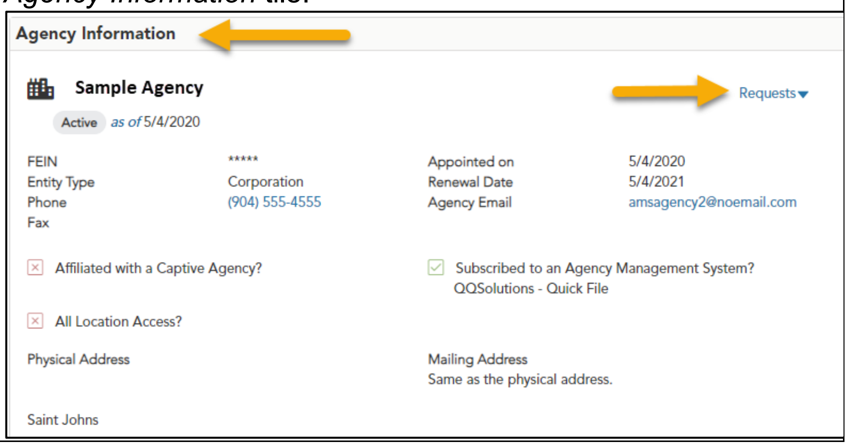
Request: E&O Information Update

The *E&O Information Update Request* will be used when any of the following errors and omissions (E&O) information has changed:

- Policy number
- Effective and/or expiration date
- Single and annual claim limits
- E&O company name and/or address

Note: Upload the E&O declarations page to support updates to E&O coverage. The declarations page can be uploaded using this request even if no other changes are required.

To update any of the above information:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Agency tab, then navigate to Requests in the Agency Information tile.

</td></tr>
</table>

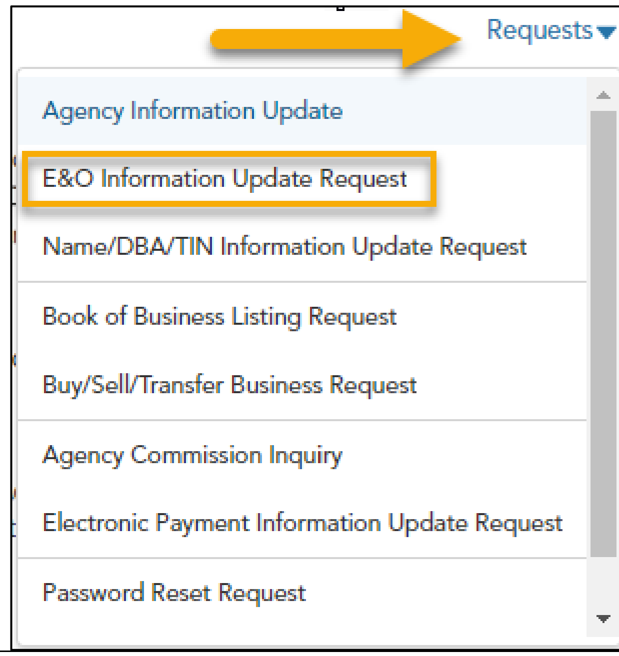
Continued on next page

***Agency* Tab**, Continued

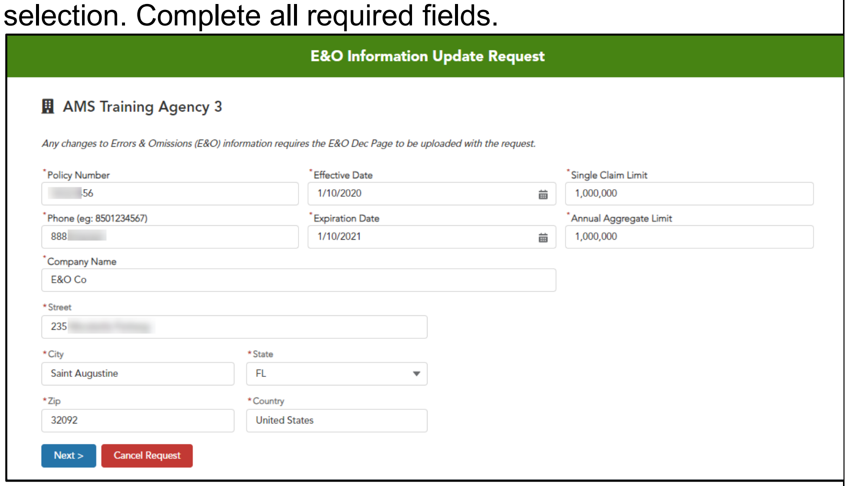
Request: E&O Information Update, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Select E&O Information Update Request from the Requests drop-down menu.

Result: The E&O Update Request window displays.



</td></tr>
<tr><td>3</td><td>Select a field to update. Additional fields may appear based on selection. Complete all required fields.



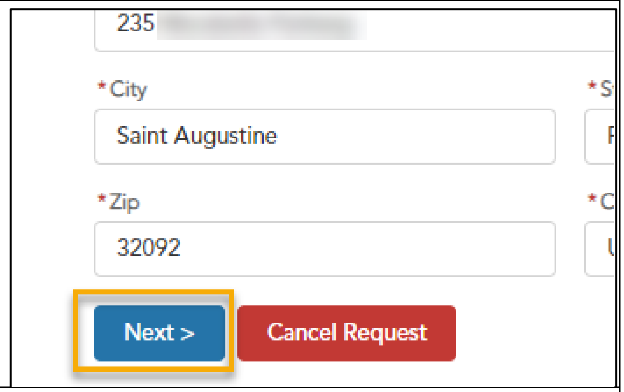
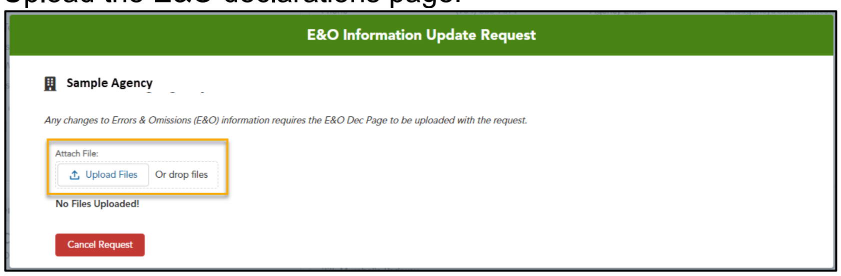
</td></tr>
</table>

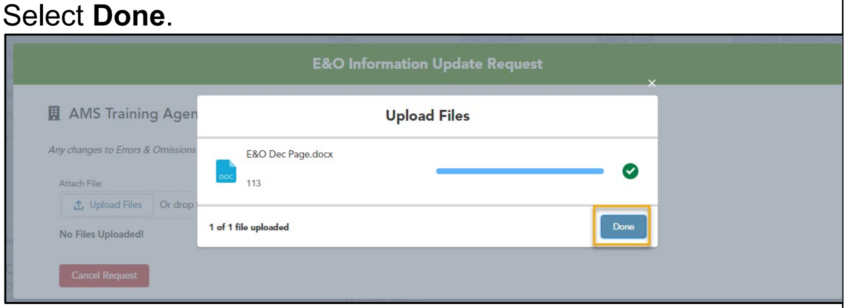
Continued on next page

***Agency* Tab**, Continued

Request: E&O Information Update, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Select Next.

Result: The E&O Information Update Request upload screen displays.

</td></tr>
<tr><td>5</td><td>Upload the E&O declarations page.


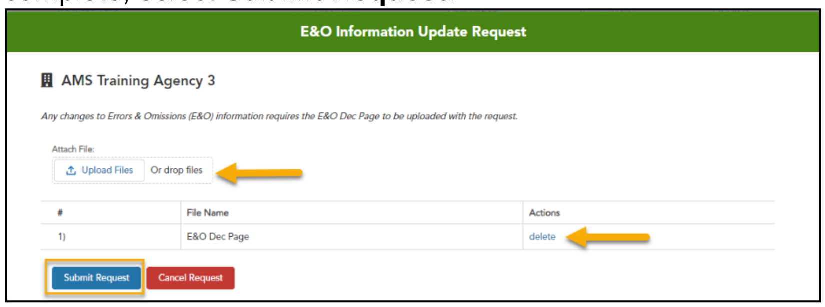
Result: Upload progress screen will display.</td></tr>
<tr><td>6</td><td>Select Done.


Result: A screen summarizing the E&O changes will appear.</td></tr>
</table>

Continued on next page

Agency Tab, Continued

Request: E&O Information Update, continued

Step	Action
7	Review the list of uploaded document(s). If needed, upload additional files, and delete a previously uploaded file. When complete, select **Submit Request.**  **Result:** A confirmation banner will display, and the status of the request can be viewed on the *Requests* tab.

Continued on next page

***Agency* Tab**, Continued

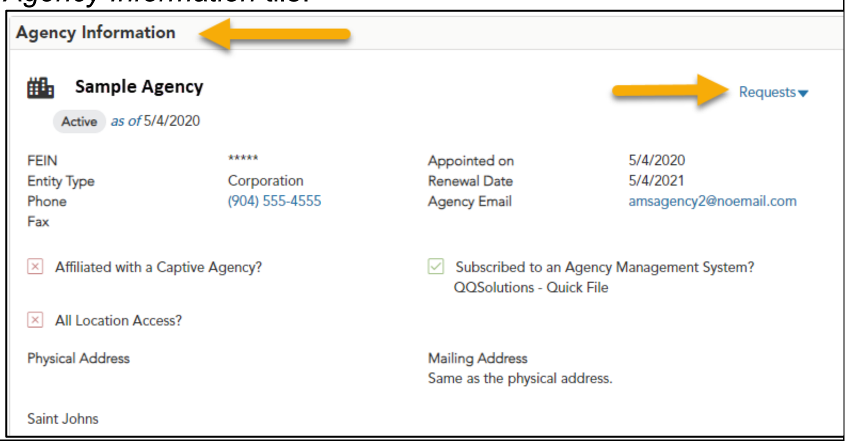
Request: Name, DBA, TIN Information Update

The *Name, DBA, TIN Information Update Request* will be used when any of the following formation had changed:

- Entity Type
- TIN (Tax ID number)
- Agency name
- Doing business as

Note: W-9 forms and updated E&O Declarations page must be uploaded to support changes to the agency name or TIN.

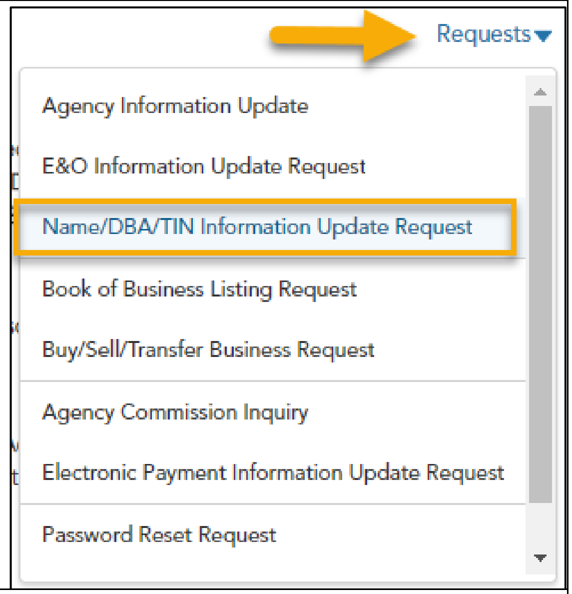
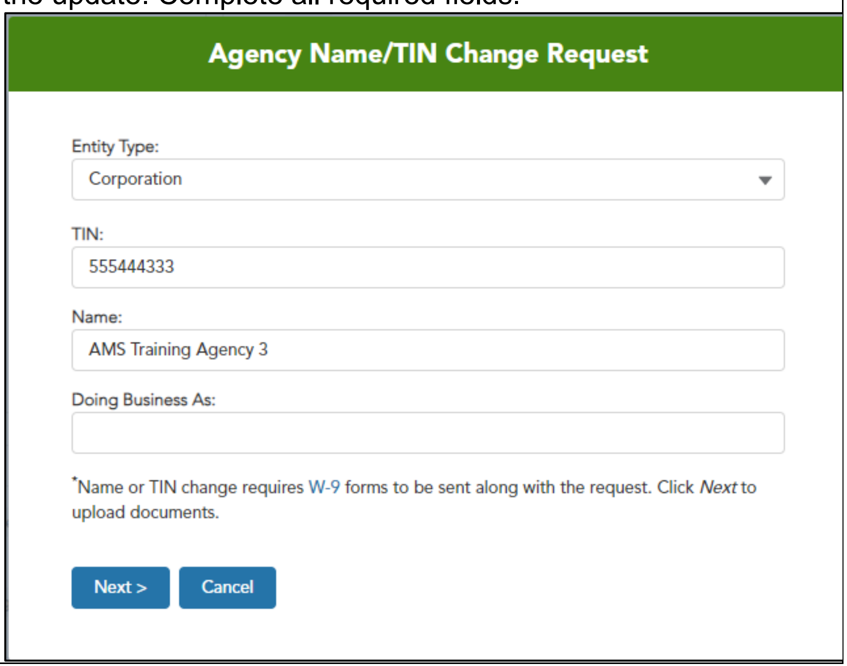
To update any of the fields list above:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Agency tab, then navigate to Requests in the Agency Information tile.

</td></tr>
</table>

Continued on next page

***Agency* Tab**, Continued

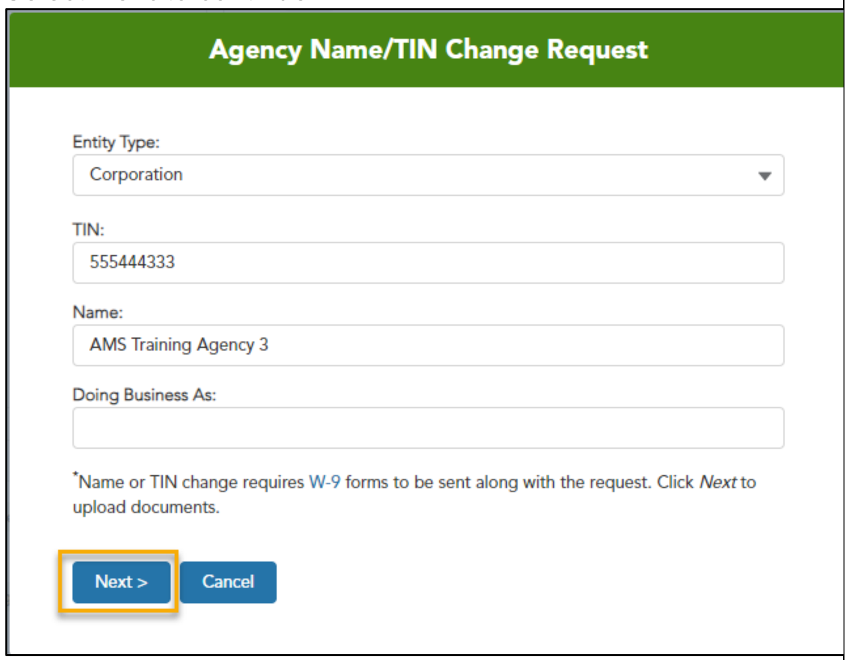
Request: Name, DBA, TIN Information Update, continued

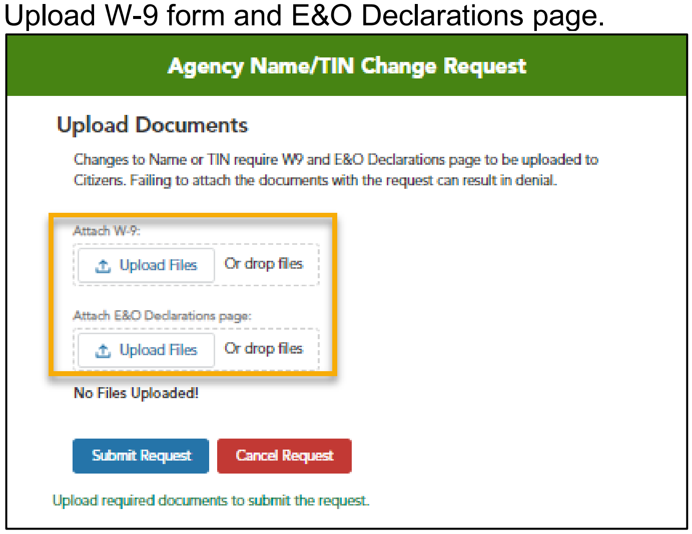
Step	Action
2	Select the **Requests** drop-down menu, then select **Name/DBA/TIN Information Update Request**. **Result:** *Name/TIN Change Request* screen appears. 
3	Select a field to update. Additional fields may appear based on the update. Complete all required fields. 

Continued on next page

Agency Tab, Continued

Request: Name, DBA, TIN Information Update, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Select Next to continue.


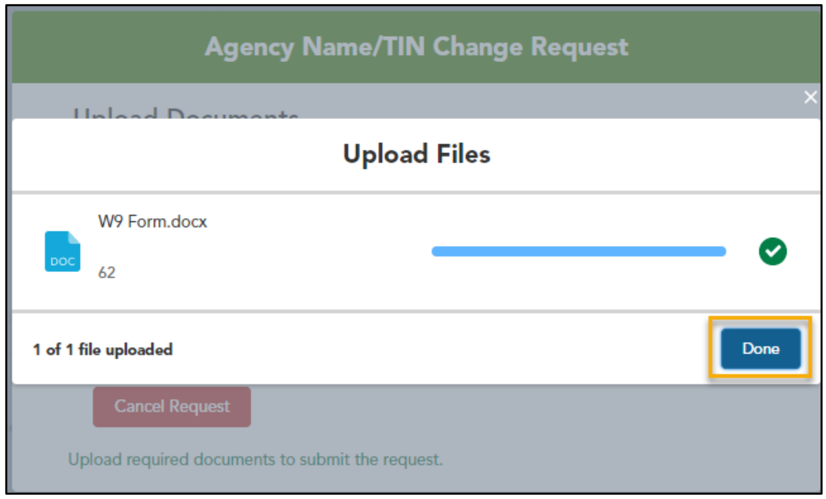
Result: The upload screen displays.</td></tr>
<tr><td>5</td><td>Upload W-9 form and E&O Declarations page.


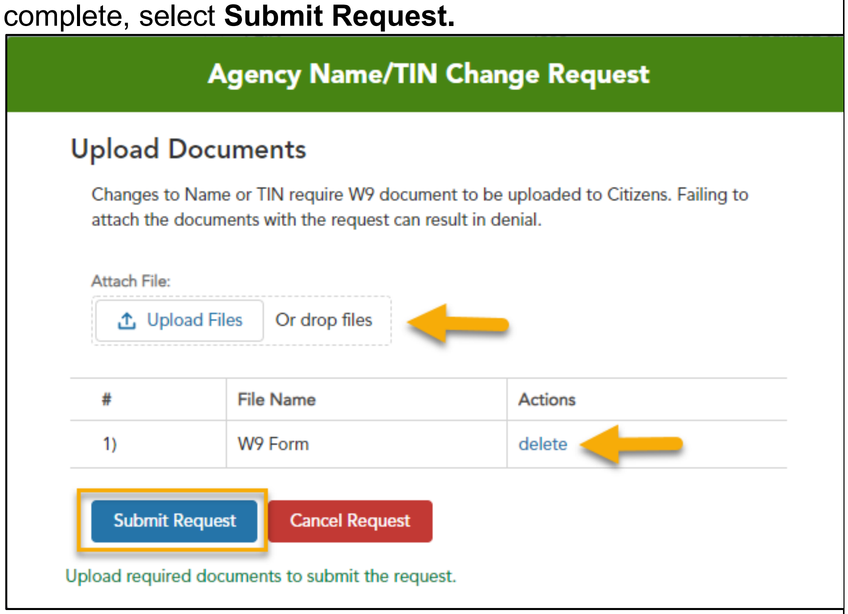
Result: The Agency Name/TIN upload progress screen appears.</td></tr>
</table>

Continued on next page

Agency Tab, Continued

Request: Name, DBA, TIN Information Update, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Select Done.


Result: A list of uploaded documents displays.</td></tr>
<tr><td>7</td><td>Review the list of uploaded document(s). If needed, Upload additional files, and/or delete previously uploaded files. When complete, select Submit Request.


Result: A confirmation banner will display, and the status of the request can be viewed on the Requests tab.</td></tr>
</table>

Continued on next page

Agency Tab, Continued

Request: Buy, Sell, Transfer

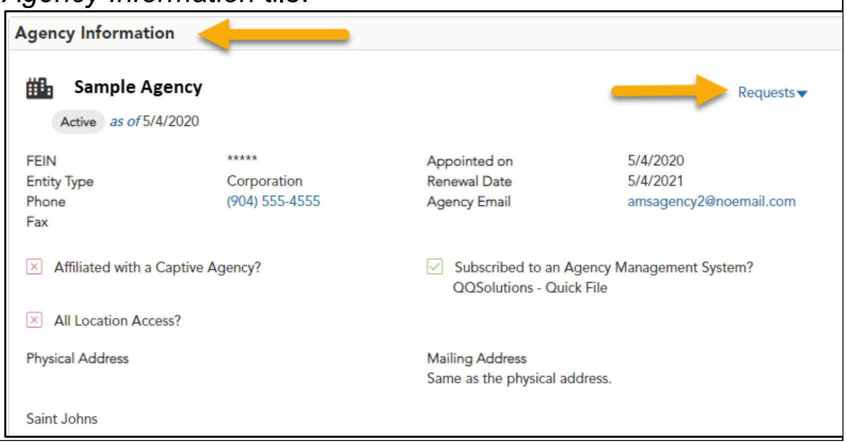
Any sale or transfer of an agency's Citizens book of business must be approved by Citizens and is not automatic.

Notes:

- The *AP* from the relinquishing agency must submit the *External Book-of-Business Transfer* (Buy/Sell). Instructions are below.
- The receiving agent(s) must have an active Citizens appointment and be appointed with the same lines of authority as the relinquishing agent.

To submit this request:

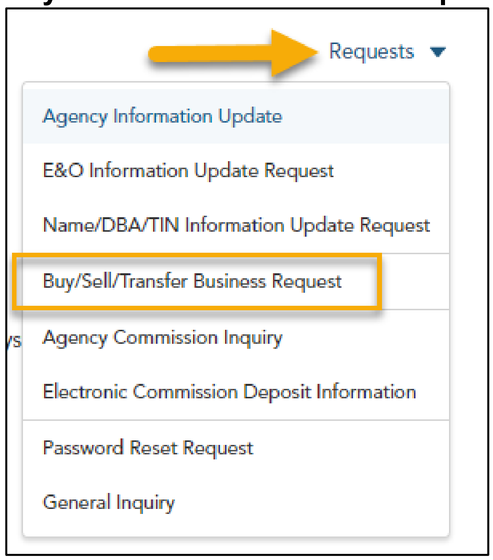
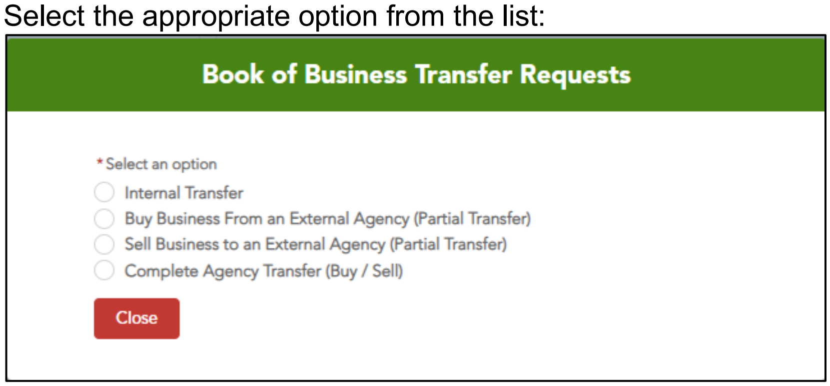
Step	Action
1	Access the *Agency* tab, then navigate to **Requests** in the *Agency Information* tile.



Continued on next page

Agency Tab, Continued

Request: Buy, Sell, Transfer, continued

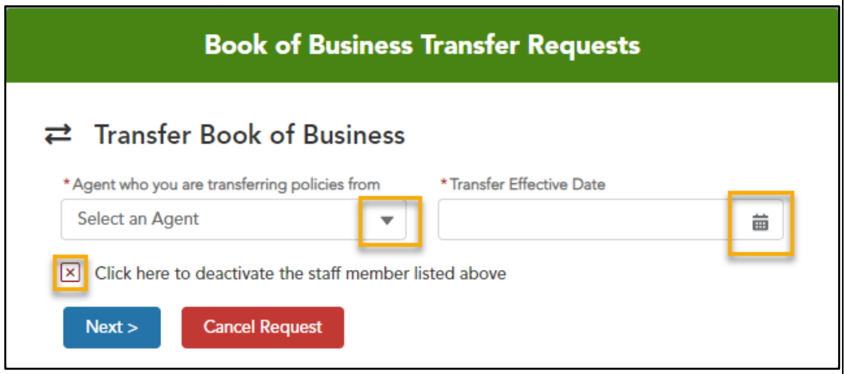
Step	Action
2	Select the **Requests** drop-down menu, then select **Buy/Sell/Transfer Business Request.**  **Result:** *The Book of Business Transfer Requests* screen appears.
3	Select the appropriate option from the list:  **Result:** Based on the selection, different screens will display.

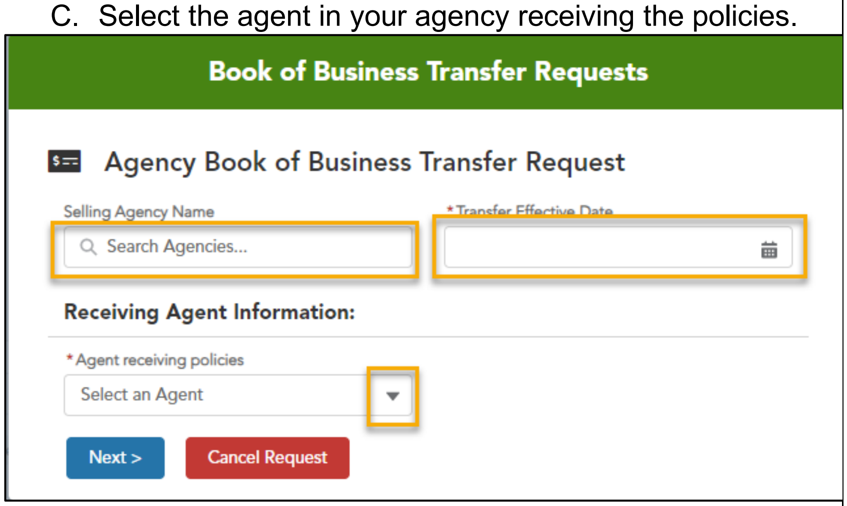
Continued on next page

***Agency* Tab**, Continued

Request: Buy, Sell, Transfer, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Complete the applicable fields.

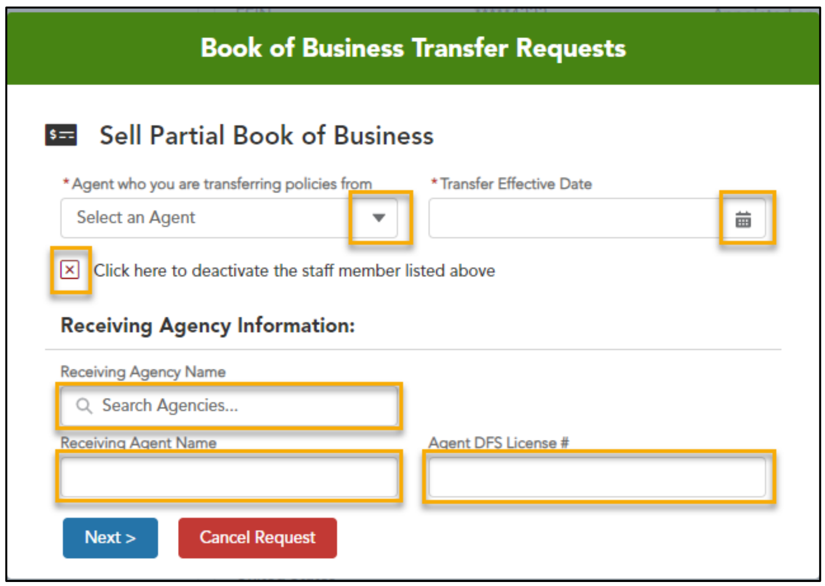
If Internal Transfer is selected:
A. Select the relinquishing agent from the drop-down from whom you are transferring the policies.
B. Select the transfer effective date.
C. If applicable, indicate to deactivate the agent listed above.


If Buy Business from an External Agency (Partial Transfer) is selected:
A. Enter a valid agency name in the Selling Agency Name field.
Note: Begin typing, then select from the list.
B. Select the transfer effective date.
C. Select the agent in your agency receiving the policies.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4, con't</td><td>

If *Sell Business to an External Agency (Partial Transfer)* is selected:

A. Select the relinquishing agent from your agency from the drop-down menu.
B. Select the transfer effective date.
C. If applicable, indicate to deactivate the agent listed above.
D. Indicate the receiving agency by entering a valid agency name.
Note: Begin typing, then select from the list.
E. Enter the receiving agent's name and their Florida Department of Financial Services (DFS) license number.



Result: The *Book of Business Transfer Request* document upload window displays.

</td></tr>
</table>

Continued on next page

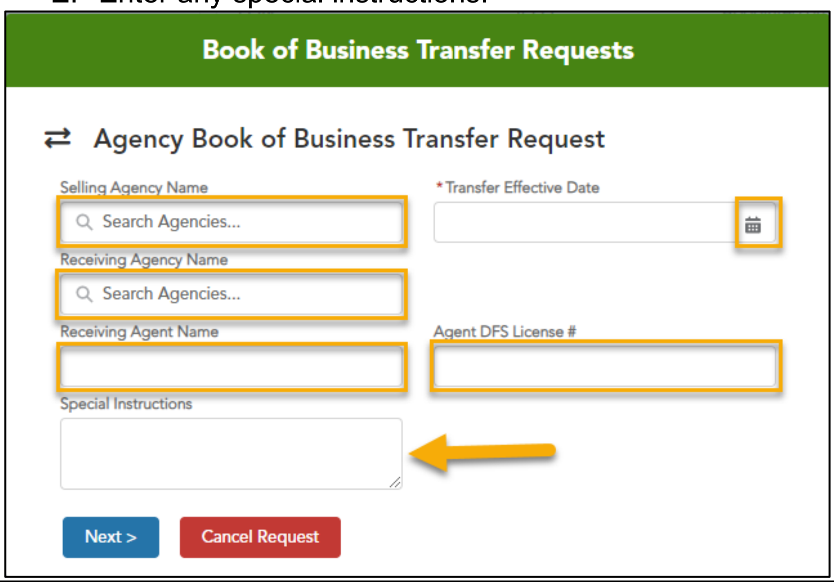
***Agency* Tab**, Continued

Request: Buy, Sell, Transfer, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4, con't</td><td>

If *Complete Agency Transfer (Buy / Sell)* is selected:

A. Search agencies to locate selling agency's name.
Note: Begin typing, then select from the list.
B. Select the transfer effective date.
C. Indicate the receiving agency by entering a valid agency name.
Note: Begin typing, then select from the list.
D. Enter the receiving agent's name and DFS license number.
E. Enter any special instructions.

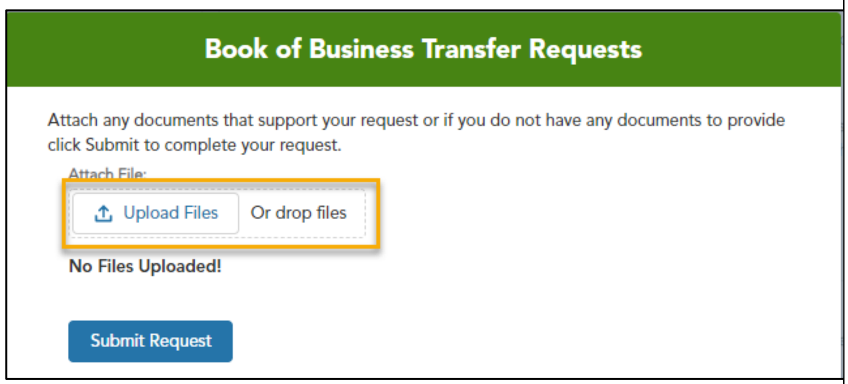
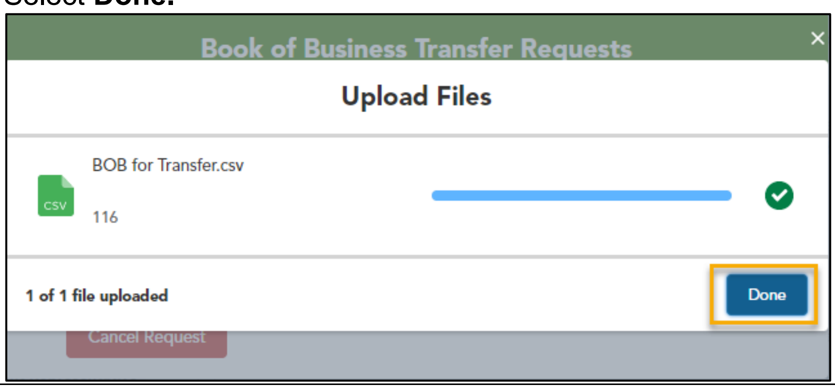


</td></tr>
<tr><td>5</td><td>Select Next to continue.</td></tr>
</table>

Continued on next page

***Agency* Tab**, Continued

Request: Buy, Sell, Transfer, continued

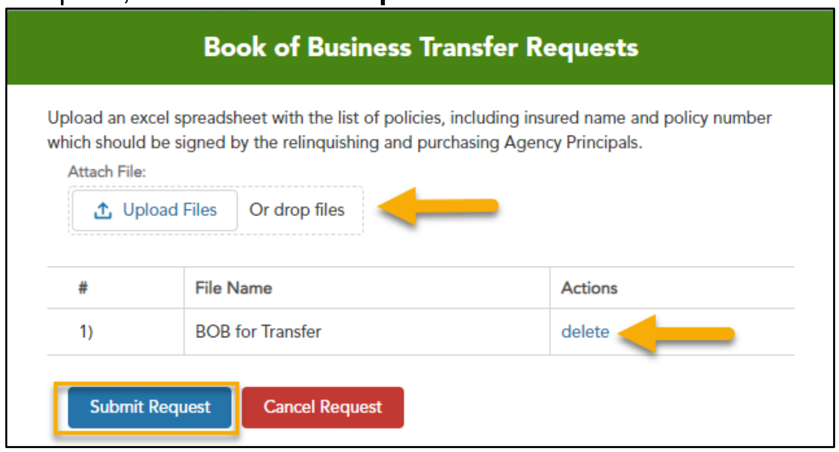
Step	Action
6	Select **Upload Files** to upload the list of policies, including insured names and policy numbers, which should be signed by the relinquishing and purchasing APs.  **Result:** The *Document Upload* progress screen displays.
7	Select **Done.** 

Continued on next page

***Agency* Tab**, Continued

Request: Buy, Sell, Transfer, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Review the list of uploaded document(s). If needed, Upload additional files and/or delete a previously uploaded files. When complete, select Submit Request.



Result: A confirmation banner will display, and the status of the request can be viewed on the Requests tab.</td></tr>
</table>

Continued on next page

***Agency* Tab**, Continued

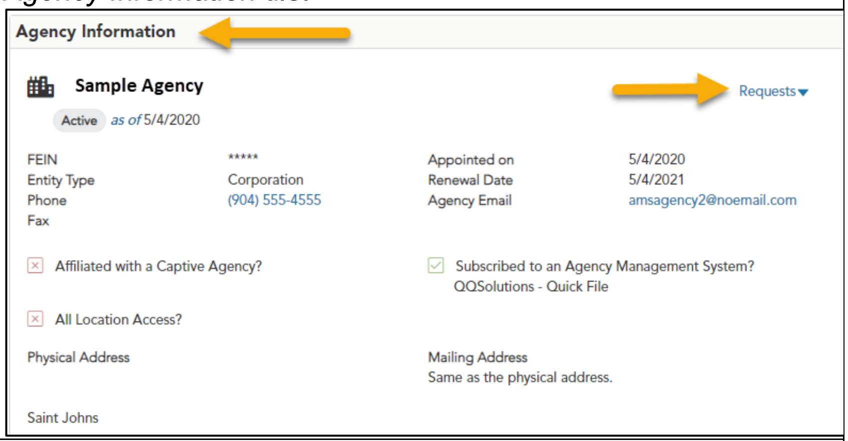
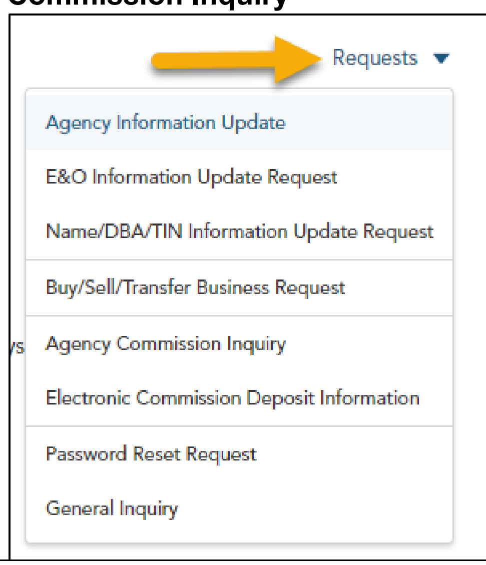
Request: Agency Commission Inquiry

The *Agency Commission Inquiry* can be used to request:

- Stop pay/reissue requests
- Commission statement copies
- Policy commission inquiry

Note: Your request should be processed within 15 business days. Citizens will send the AP an email when completed.

To submit an *Agency Commission Inquiry*:

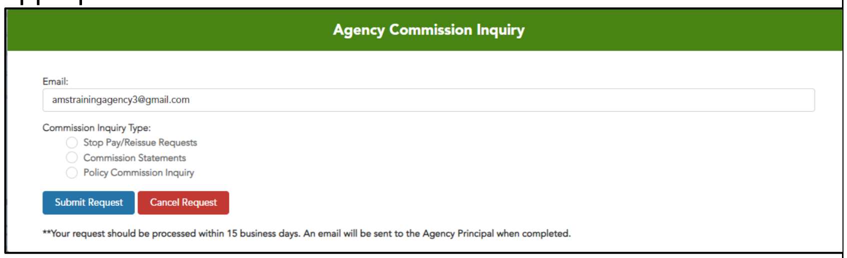
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Agency tab, then navigate to Requests in the Agency Information tile.

</td></tr>
<tr><td>2</td><td>Select the Requests drop-down, then select Agency Commission Inquiry


Result: The Agency Commission Inquiry screen appears.</td></tr>
</table>

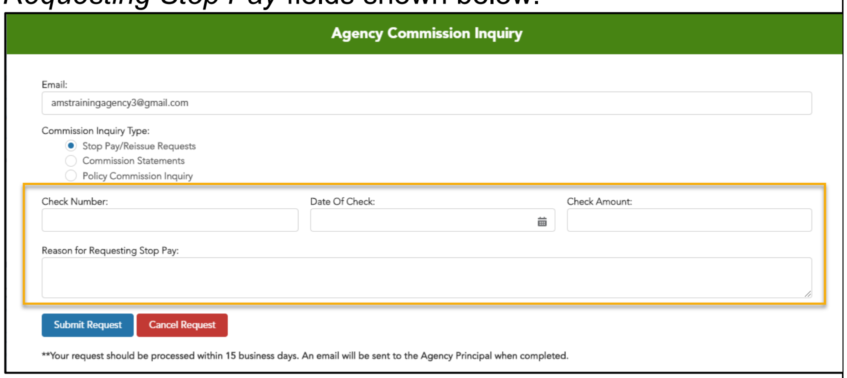
Continued on next page

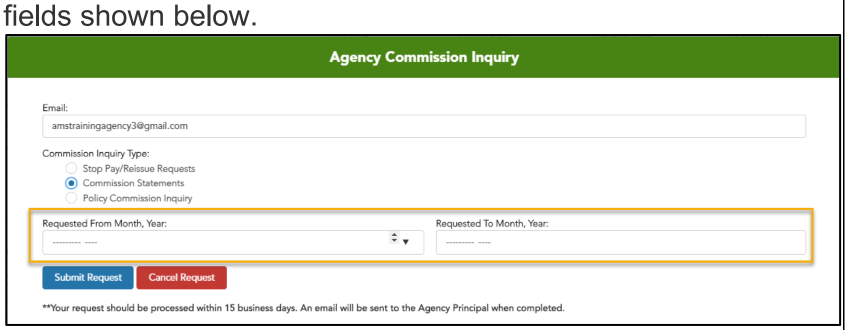
***Agency* Tab**, Continued

Request: Agency Commission Inquiry, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Confirm the displayed email address, then select the appropriate action.


Result: Based on the selection, different screens will display.</td></tr>
<tr><td>4</td><td>Complete the applicable fields.

If submitting a Stop Pay/Reissue Request, complete the Check Number, Date of Check, Check Amount, and Reason for Requesting Stop Pay fields shown below.


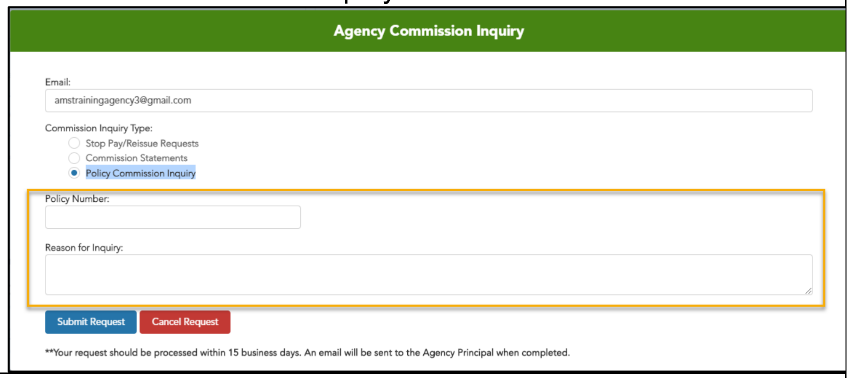
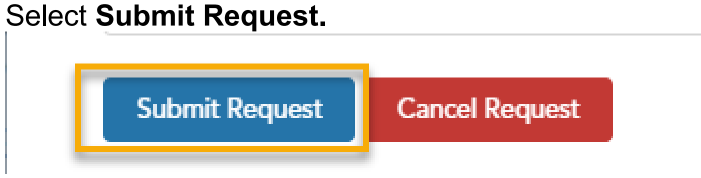
If requesting Commission Statements, complete the Requested From Month, Year and Requested To Month, Year fields shown below.


</td></tr>
</table>

Continued on next page

Agency Tab, Continued

Request: Agency Commission Inquiry, continued

Step	Action
4, con't	**If submitting a *Policy Commission Inquiry***, enter the policy number and reason for inquiry. 
5	Select **Submit Request.**  **Result:** A confirmation banner will display, and the status of the request can be viewed on the *Requests* tab.

Continued on next page

Agency Tab, Continued

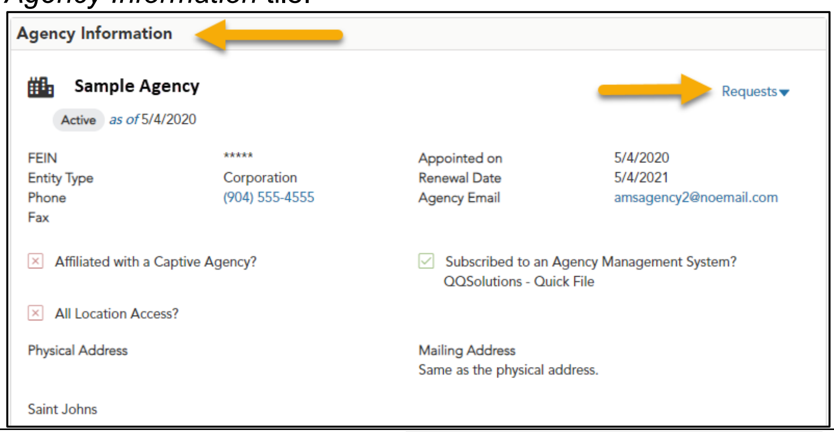
Request: Electronic Payment Information Update

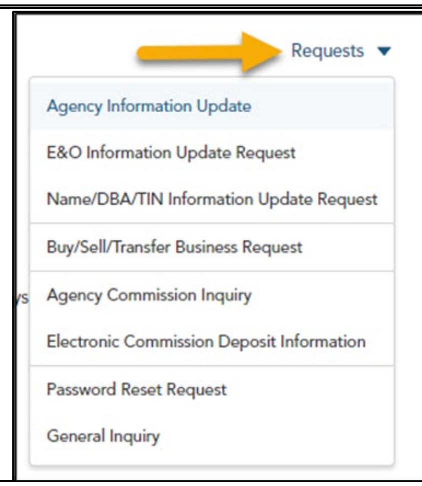
Citizens can pay commissions electronically (direct deposit) to the agency's financial institution.

The *Electronic Payment Information Update* request can be used to enroll, change, or cancel an electronic payment agreement.

Note: Commission schedules and rates can be accessed on the Citizens website.

To request a change to the electronic payment information:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Agency tab, then navigate to Requests in the Agency Information tile.

</td></tr>
<tr><td>2</td><td>Select the Requests drop-down, then select Electronic Payment Information Update Request.

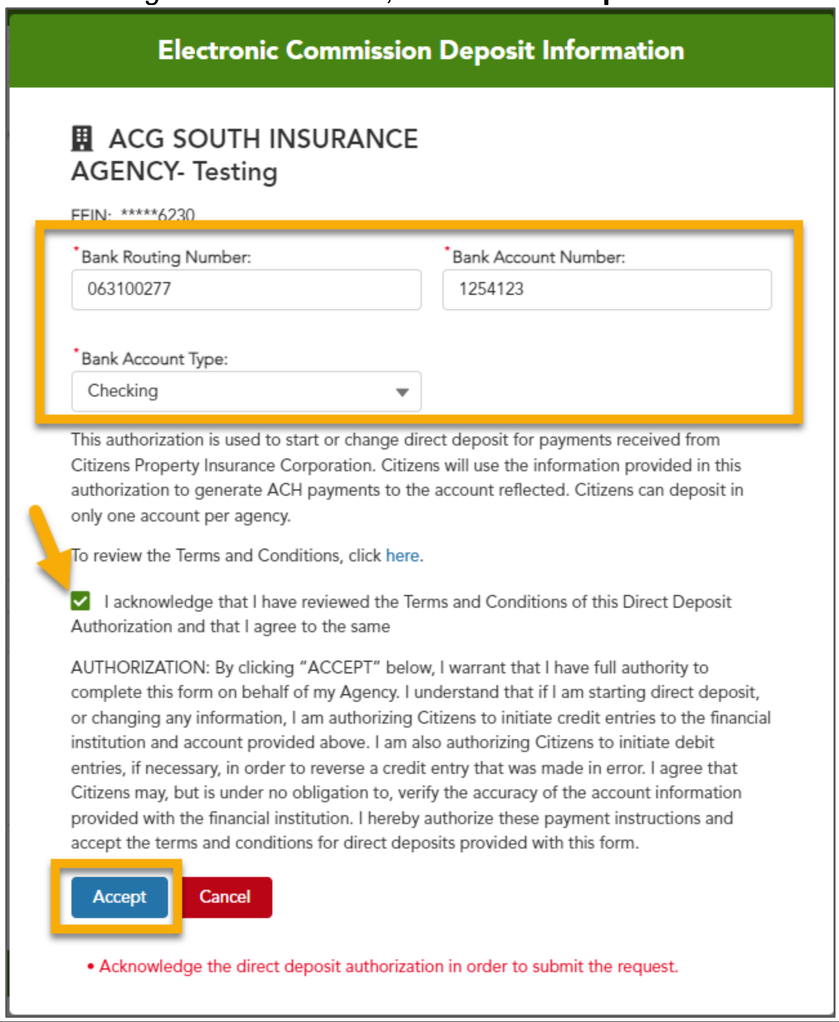
Result: Electronic Commission Deposit Information screen appears.

</td></tr>
</table>

Continued on next page

***Agency* Tab**, Continued

Request: Electronic Payment Information Update, continued

Step	Action
3	If necessary, update the *Banking information*, select the *Acknowledgement Statement*, then click **Accept**.



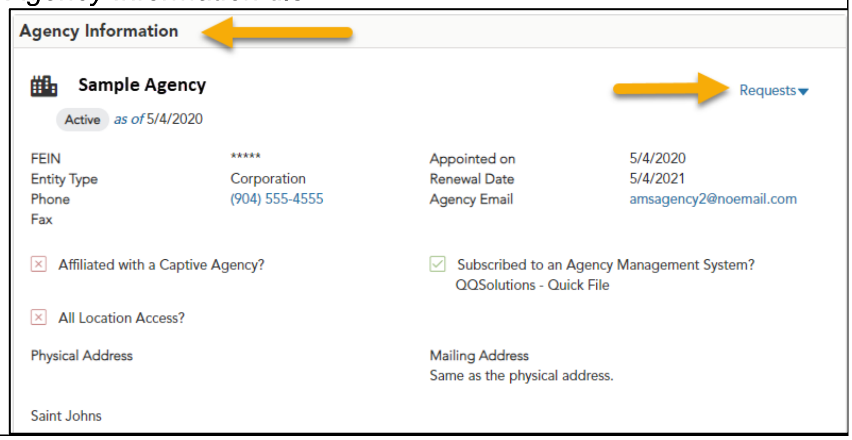
Continued on next page

***Agency* Tab**, Continued

Request: Password Reset

APs can request a password reset for their staff. To submit a password reset request.

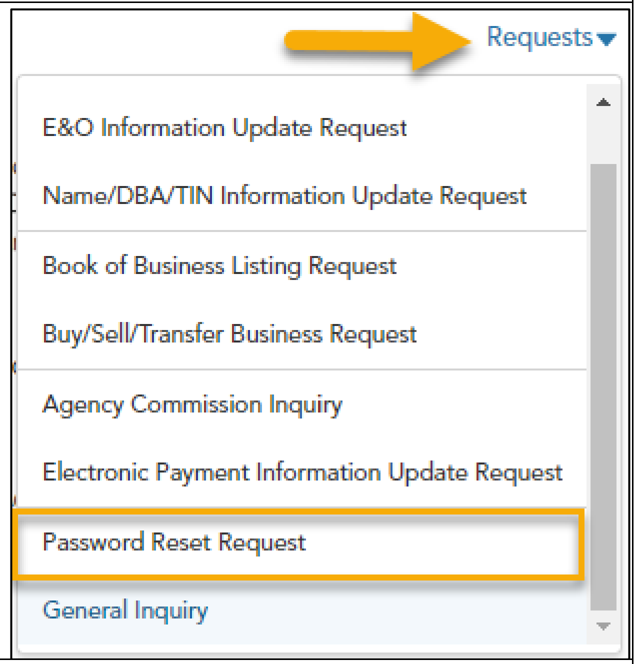
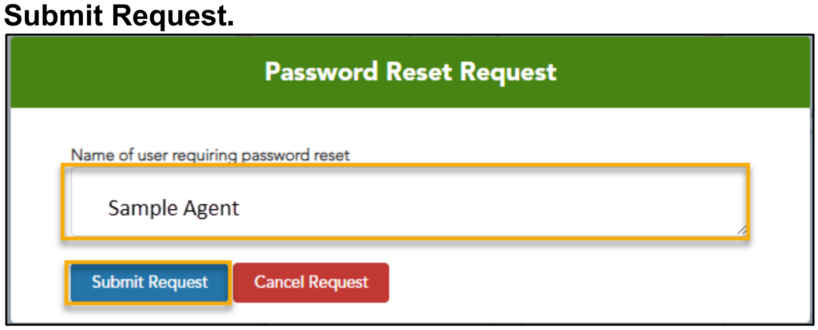
To submit a password reset request:

Step	Action
1	Access the *Agency* tab, then navigate to **Requests** in the *Agency Information* tile. 

Continued on next page

***Agency* Tab**, Continued

Request: Password Reset, continued

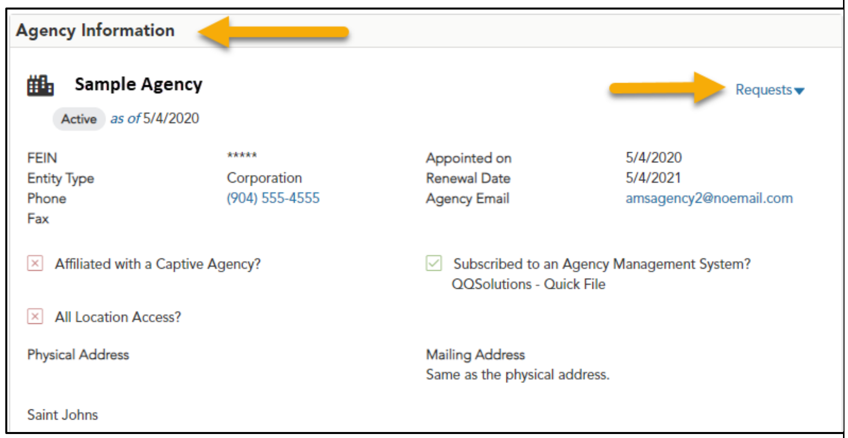
Step	Action
2	Select the **Requests** drop-down menu, then select **Password Reset Request** **Result:** *Password Reset Request* screen appears. 
3	Enter the name of user requiring password reset, then select **Submit Request.**  **Result:** A confirmation banner will display, and the status of the request can be viewed on the *Requests* tab.

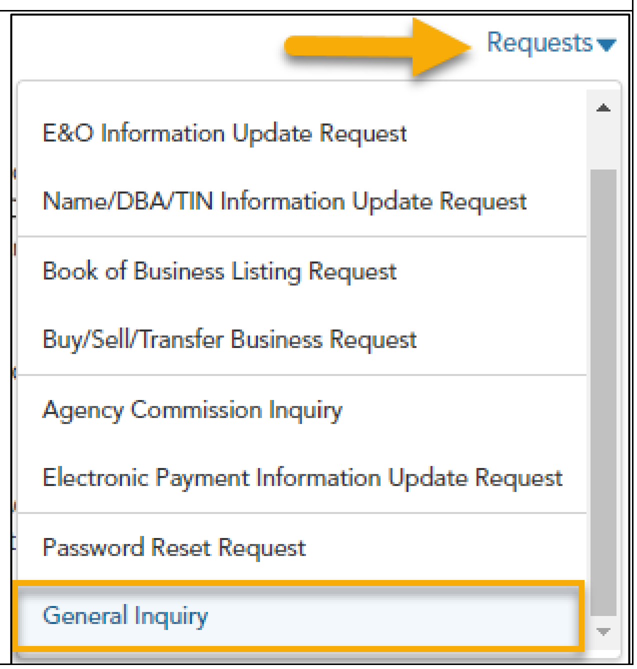
Continued on next page

***Agency* Tab**, Continued

Request: General Inquiry

To submit a *General Inquiry* request:

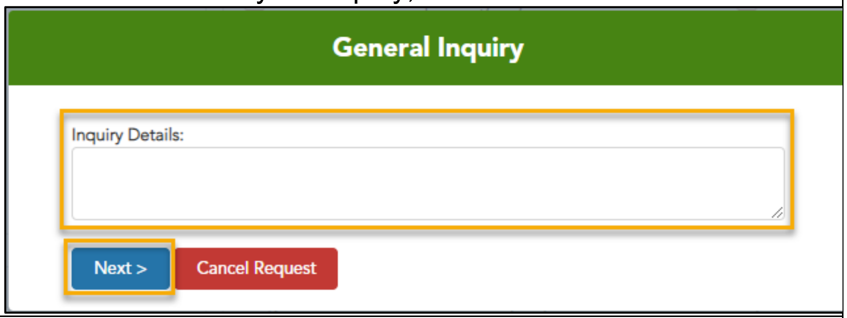
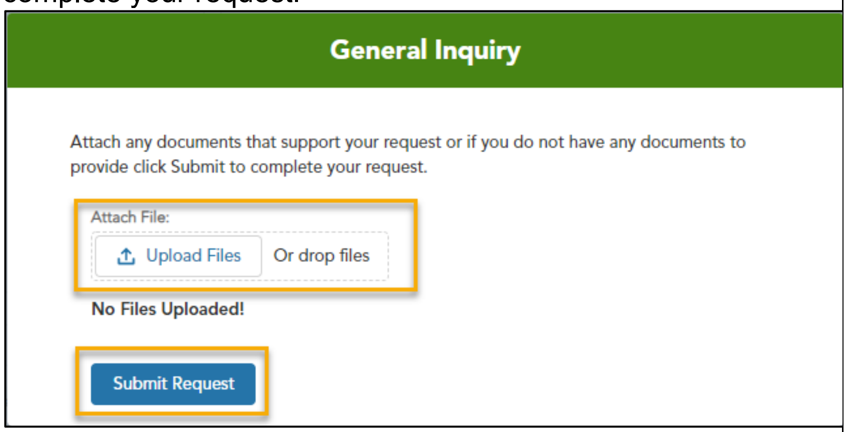
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Agency tab, then select Requests in the Agency Information tile.

</td></tr>
<tr><td>2</td><td>Select the Requests drop-down, then select General Inquiry

Result: The General Inquiry screen appears.

</td></tr>
</table>

Continued on next page

***Agency* Tab**, Continued

Request: General Inquiry, continued

Step	Action
3	Enter the details of your inquiry, then select **Next.** 
4	Upload any documents that support your request or if you do not have any documents to provide select **Submit Request** to complete your request.  **Result:** A confirmation banner will display, and the status of the request can be viewed on the *Requests* tab.

Appointment Renewals

Appointment Renewal Overview

All agent appointments from the agency will renew on the same day. Any agents appointed mid-term will have pro-rated appointment fees, and their renewal appointment date will align with that of the other appointed agents in their agency.

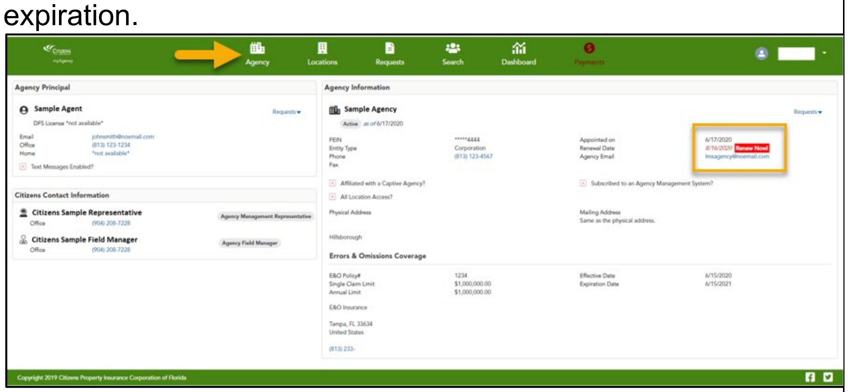
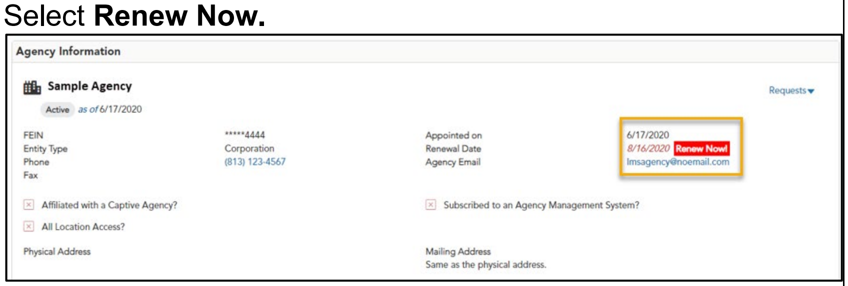
Processing Appointment Renewals

APs and their designees will receive notice of pending appointment renewals 60 days prior to the expiration of the agency's appointment with Citizens. Additional notices will be sent 30, ten and two days prior to appointment expiration.

Important Notes:

- If the renewal is not processed by the renewal date, the option will expire.
- Any credentialed user that has not completed mandatory training will not be able to renew their appointment with Citizens. Refer to Appendix 2: Agent Appointment Education Requirements for more information.

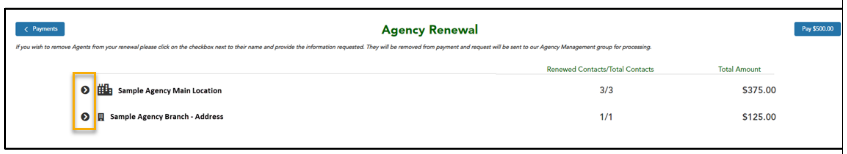
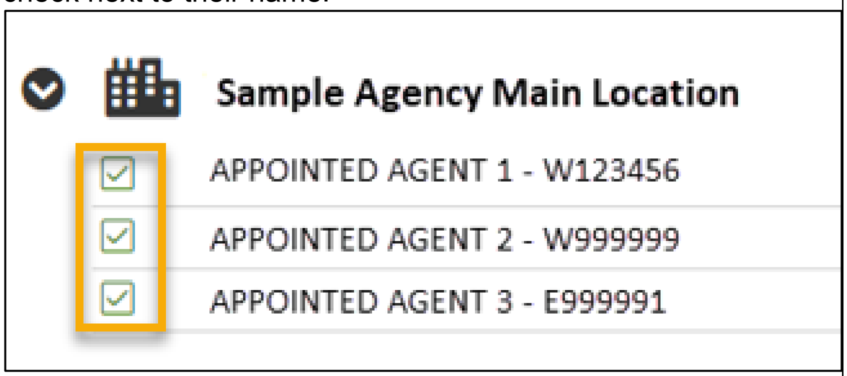
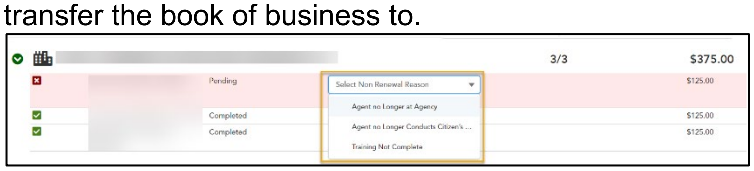
To process an agent/agency appointment renewal:

Step	Action
1	Access the **Agency** tab up to sixty days prior to appointment expiration.  **Result:** The Renew *Now* icon will display.
2	Select **Renew Now.**  **Result:** The *Agency Renewal* page appears.

Continued on next page

Appointment Renewals, Continued

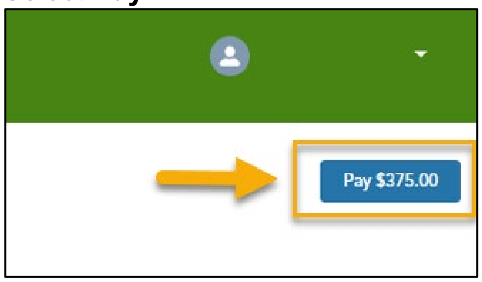
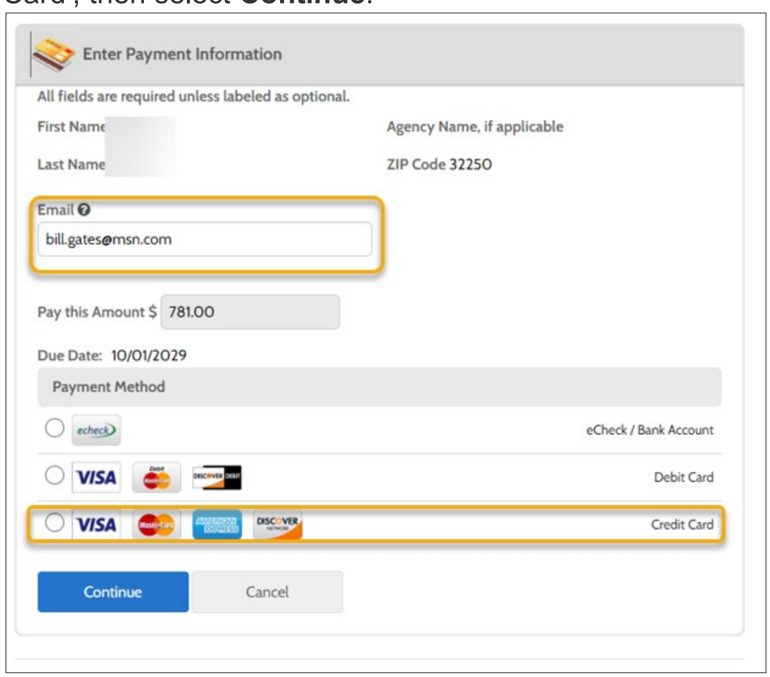
Processing Appointment Renewals, continued

Step	Action
3	To review a list of appointed agents for each agency location, select the arrow next to each location.  **Result:** All staff assigned to the location displays. Review to confirm accuracy. If changes are not needed, continue to Step 6.
4	If changes to appointed agents are needed, select the green check next to their name.  **Result:** The line will highlight and drop-down menu options will display. *Note:* The payment button will be unavailable if any of the listed agents or LCRs have failed to complete mandatory Citizens training. Continue to Step 5 to remove them from the renewal or refer to Appendix 2 Appointment Education Requirements for further instructions to complete mandatory education.
5	Select a nonrenewal reason and, if appropriate, an agent to transfer the book of business to.  **Result:** The recalculated amount due will display.

Continued on next page

Appointment Renewals, Continued

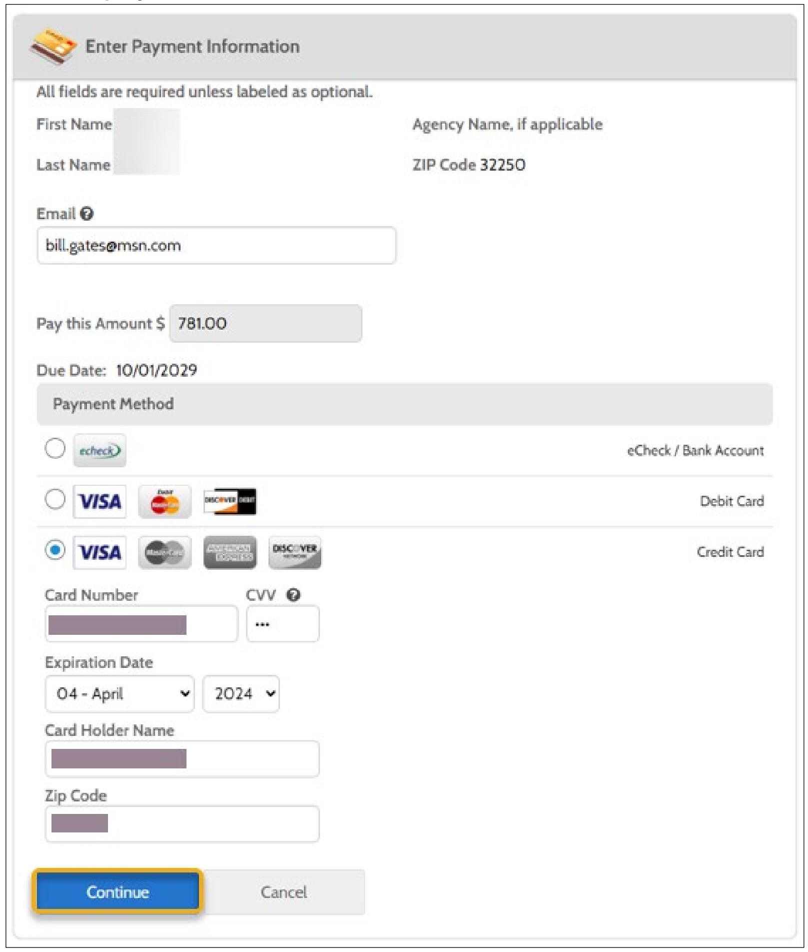
Processing Appointment Renewals, continued

Step	Action
6	Select **Pay.**  **Result:** The *One-Time Payment* screen appears. *Note:* Fees for supplemental applications that are pending payment within 60 days of the renewal date will be included in the renewal balance.
7	Enter the email address you will need the payment receipt issued to and select the desired payment method. Ex. ‘Credit Card’, then select **Continue**:  **Result:** The *One-Time Payment* screen appears.

Continued on next page

Appointment Renewals, Continued

Processing Appointment Renewals, continued

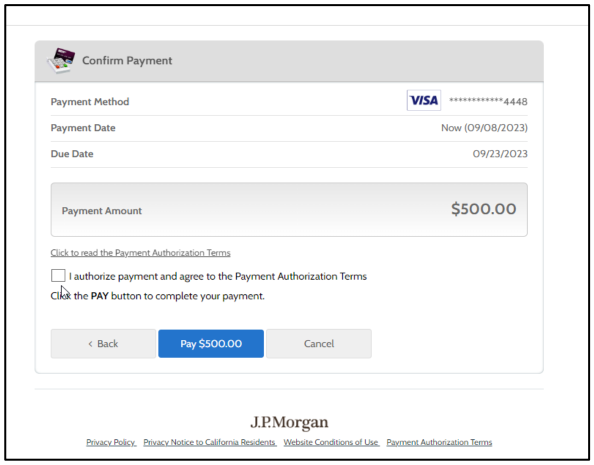
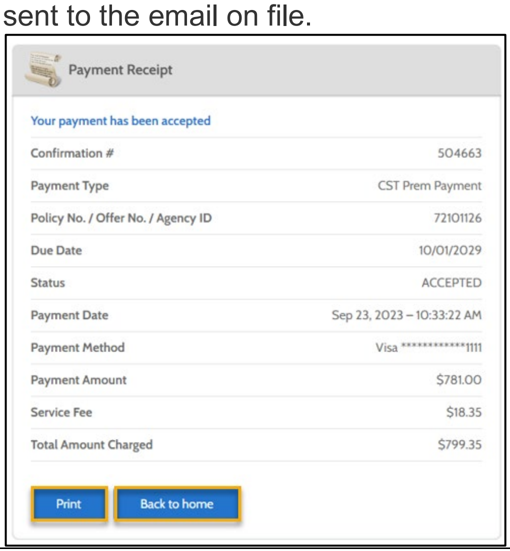
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Ensure payment information is correct, then select Continue:


Result: The Confirm Payment screen will appear.</td></tr>
</table>

Continued on next page

Appointment Renewals, Continued

Processing Appointment Renewals, continued

Step	Action
9	The payment amount will display. elect the **Authorize** box before proceeding to the blue *'Pay $0.00'* button at the bottom of the screen.  *Note:* You must agree to the terms and conditions prior to proceeding.
10	The Payment Receipt will generate if processed successfully. Options will appear at the bottom of the confirmation to either **Print** of return **Back to Home**. Payment confirmation will be sent to the email on file. 

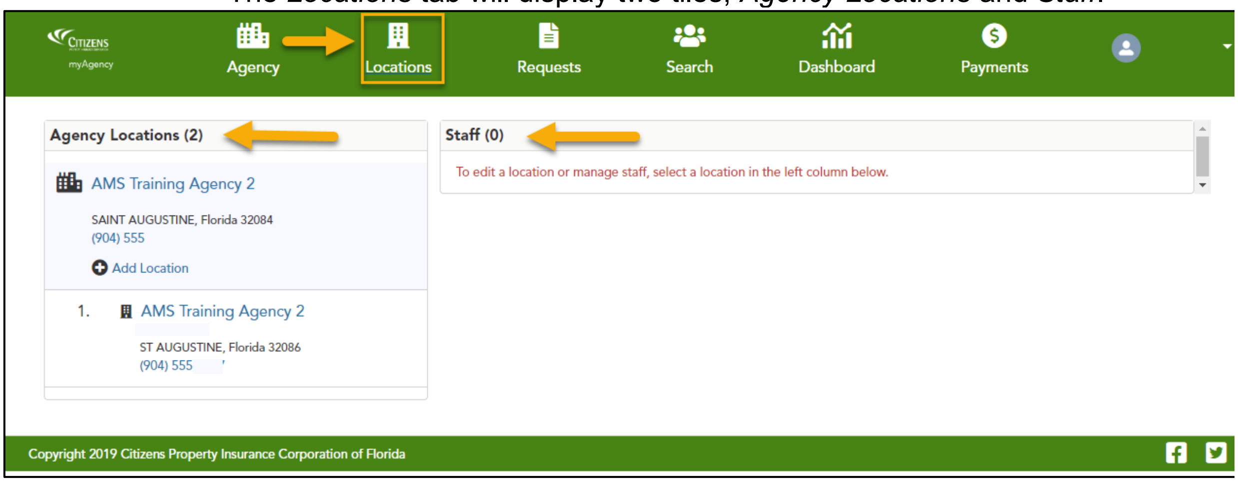
Locations Tab

Functions Overview

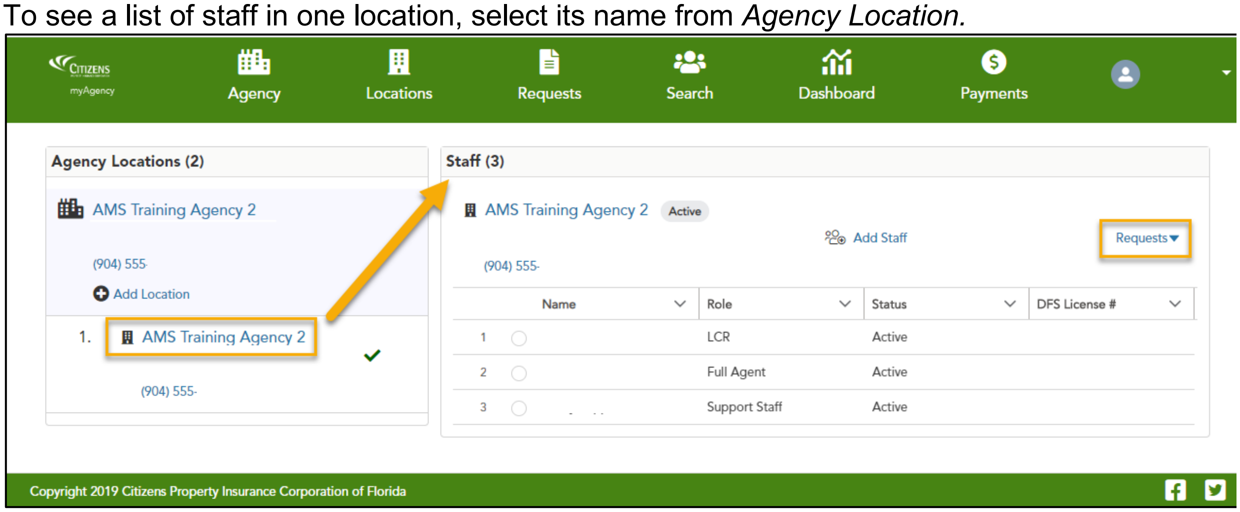
The *Locations* tab enables APs to view and manage staff, appointments and location details:

- View locations
- Add location
- Add staff
- Update staff information
- Transfer staff to a new location
- Update an agent's line of authority
- Remove staff

To access the *Locations* tab, select **Locations** from the banner.
The *Locations* tab will display two tiles, *Agency Locations* and *Staff*.



To see a list of staff in one location, select its name from *Agency Location.*



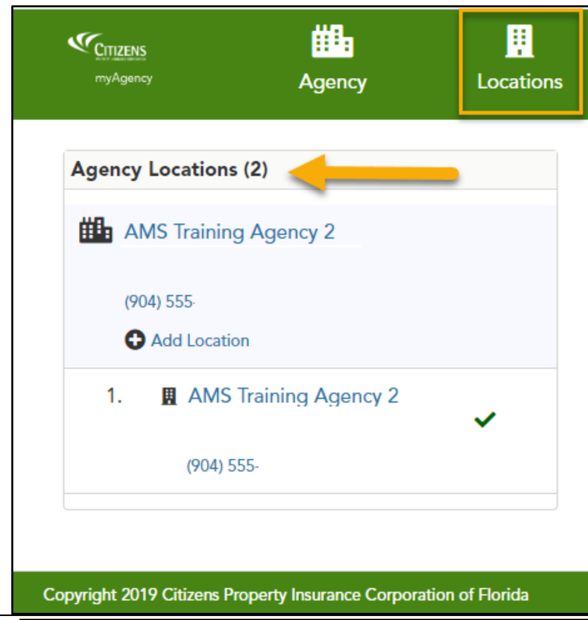
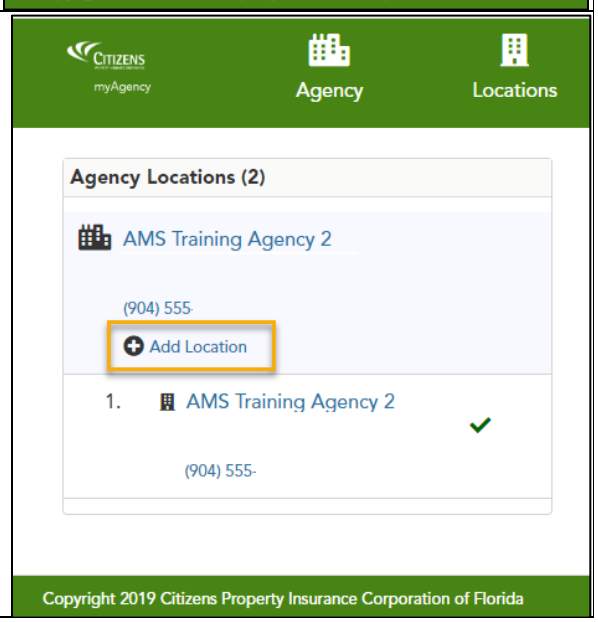
Continued on next page

Locations Tab, Continued

Supplemental Application: Add Location

When adding a new location, a fully appointed agent also must be added to the new location when the request is submitted.

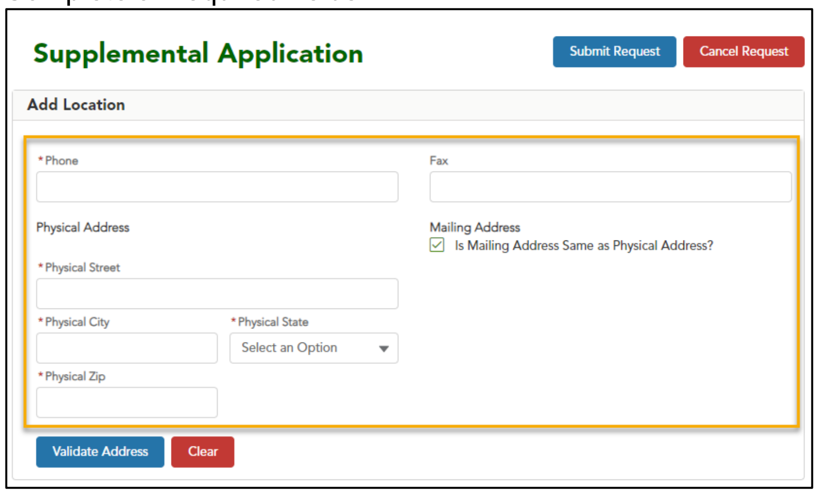
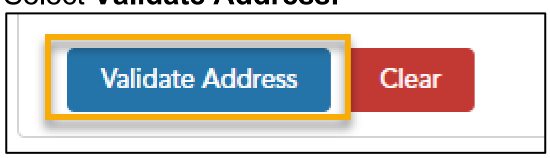
If a new location needs to be added:

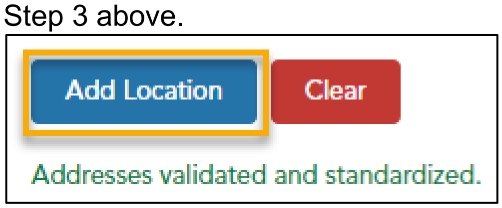
Step	Action	
1	Access the **Locations** tab, then navigate to the *Agency Locations* tile.	
2	Select **Add Location.** **Result:** The *Supplemental Application* screen displays.	

Continued on next page

Locations Tab, Continued

Supplemental Application: Add Location, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Complete all required fields.

</td></tr>
<tr><td>4</td><td>Select Validate Address.


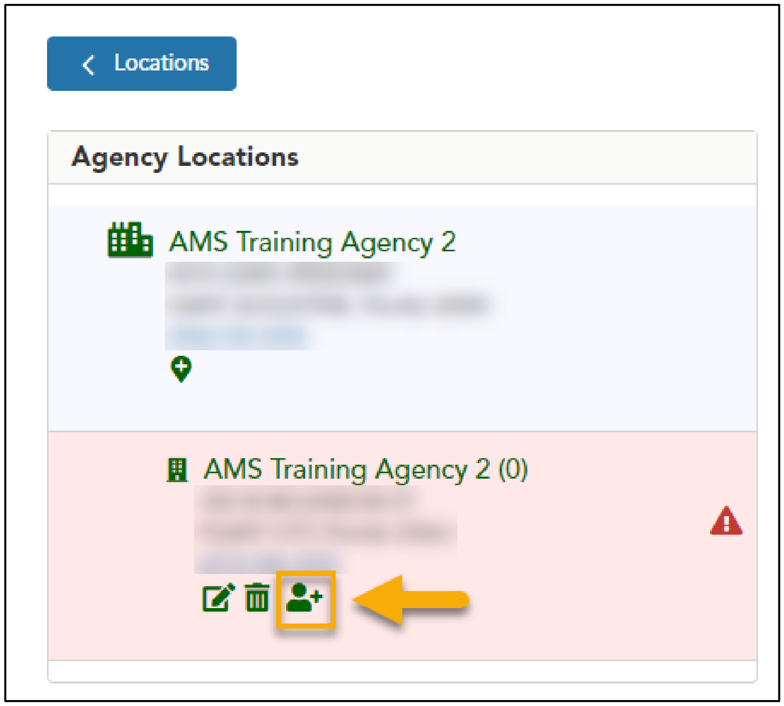
Result: The address is validated and standardized.</td></tr>
<tr><td>5</td><td>To add an additional location, select Add Location. Repeat Step 3 above.


Result: The new location appears on the Agency Locations tile.</td></tr>
</table>

Continued on next page

***Locations* Tab**, Continued

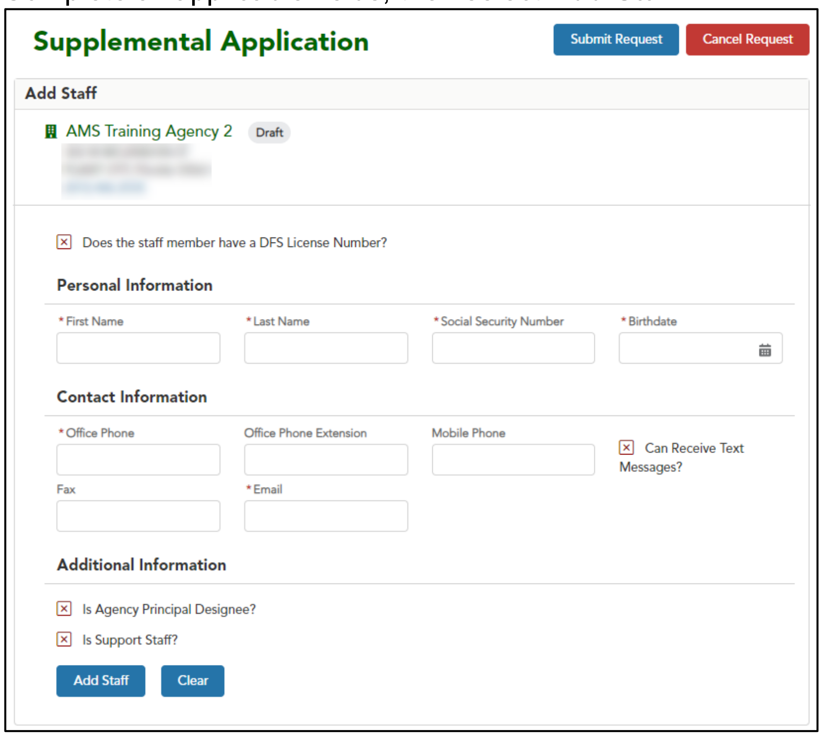
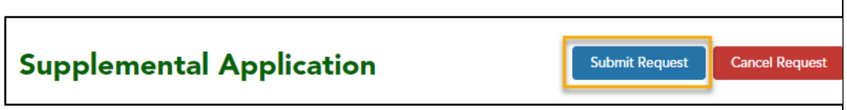
Supplemental Application: Add Location, continued

Step	Action
6	To add staff to the new location, select the **green icon** as shown below.  **Result:** The *Add Staff* screen displays.

Continued on next page

Locations Tab, Continued

Supplemental Application: Add Location, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Complete all applicable fields, then select Add Staff.

Note: Refer to Supplemental Application: Add Staff Overview for detailed instructions on adding staff.</td></tr>
<tr><td>8</td><td>When you have added necessary staff at the new location, select Submit Request.

Result: A confirmation banner will display, and the status of the request can be viewed on the Requests tab.</td></tr>
</table>

Continued on next page

Locations Tab, Continued

Supplemental Application: Add Staff Overview

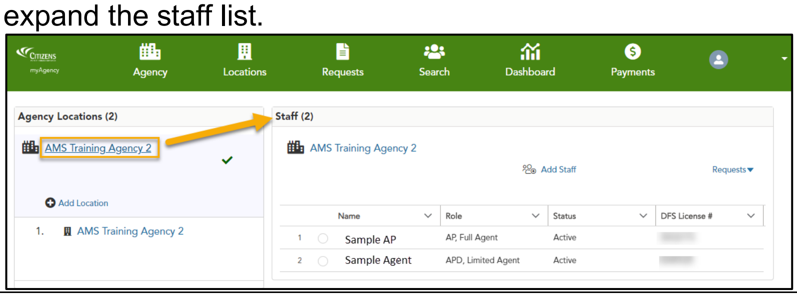
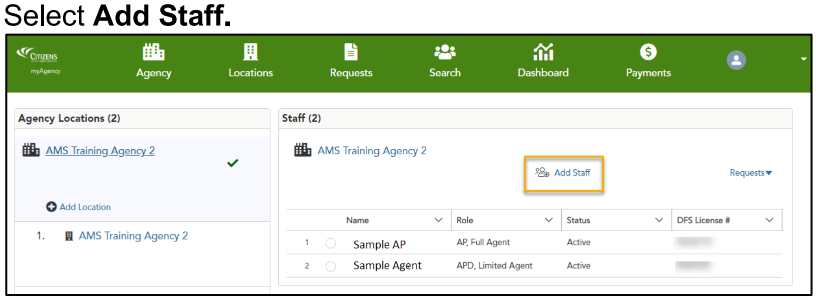
You can add staff via the *Supplemental Application* when adding a new location or from the *Locations* tab in the *Staff* tile.

Notes:

- When adding staff, APs can assign various appointment types based on license, location and job duties. Refer to Appendix 1 Assigning Staff Appointment Types to determine which role best fits the staff you are adding.
- Agents previously terminated by Citizens for cause are not eligible to apply within two years of their termination date.
- Fees for supplemental applications that are pending payment within 60 days of the renewal date will be included in the renewal balance.

To access the *Add Staff* function:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Add Staff function, either from the Supplemental Application to Add Location, or from the Locations tab.

To access from the Locations tab, select an agency location to expand the staff list.

</td></tr>
<tr><td>2</td><td>Select Add Staff.


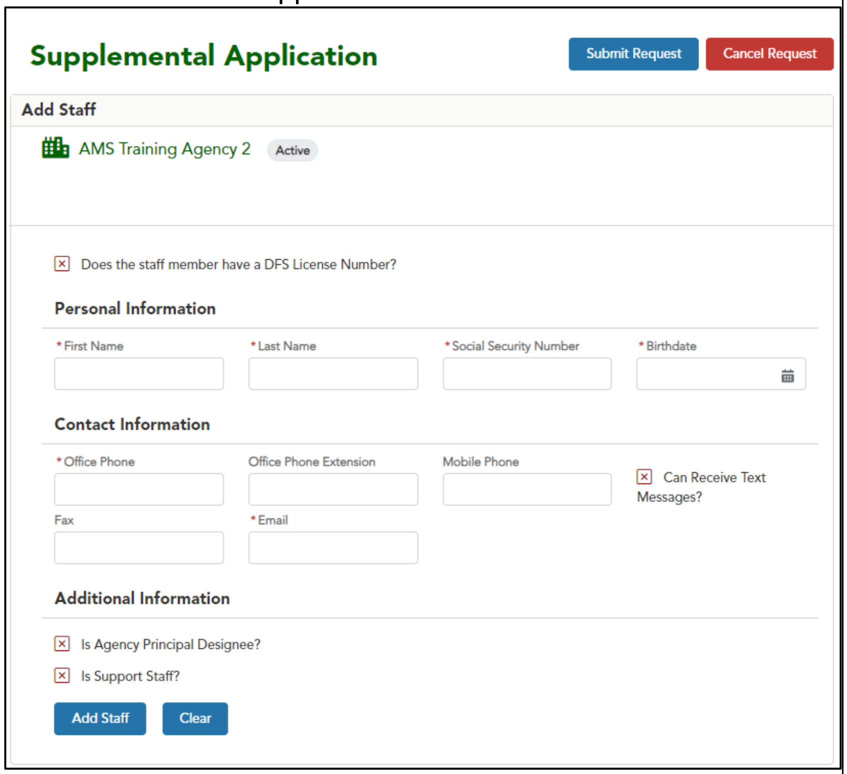
Result: The Supplemental Application to add staff will display.</td></tr>
</table>

Continued on next page

***Locations* Tab**, Continued

Supplemental Application: Add Staff Overview, continued

Step	Action
3	The *Supplemental Application* screen is dynamic, and additional fields will appear based on the information entered.



To add staff, refer to the appropriate section below:

If adding a:	Then see:
Fully Appointed Agent	Add Staff: Fully Appointed Agent
Limited Agent	Add Staff: Limited Agent
Licensed Customer Representative who writes and services	Add Staff: LCR Write and Service
Licensed Customer Representative who only services	Add Staff: LCR Service Only
Support Staff	Add Staff: View-Only Support

Continued on next page

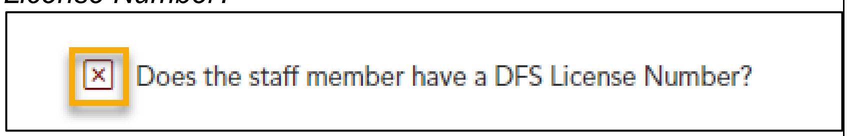
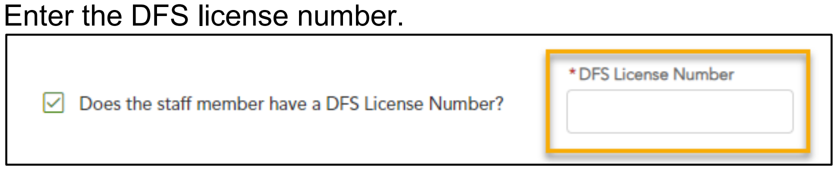
Locations **Tab**, Continued

Add Staff: Fully Appointed Agent

Fully appointed agents must meet the following additional requirements to be appointed with Citizens:

- 2-20 or 20-44 Florida resident agent license or a 9-20 or 90-44 nonresident agent license.
- Appointment with at least one authorized insurer writing one or more of the following lines of business:
  - Personal Residential
  - Commercial Residential
  - Commercial Nonresidential Property
- Agents previously terminated by Citizens for cause are not eligible to apply within two years of their termination date.

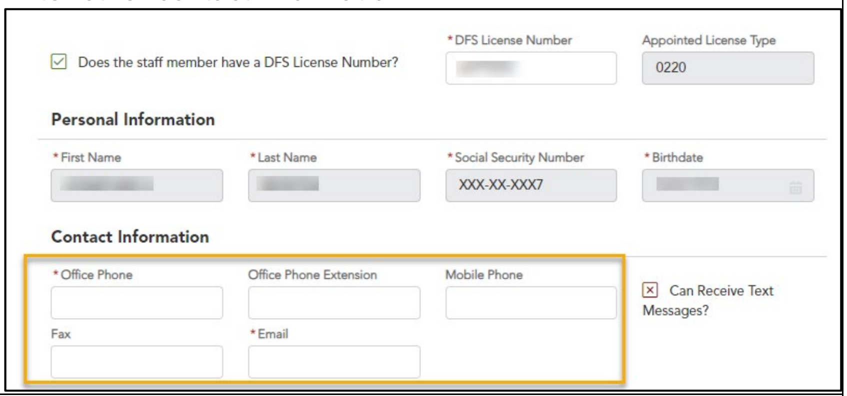
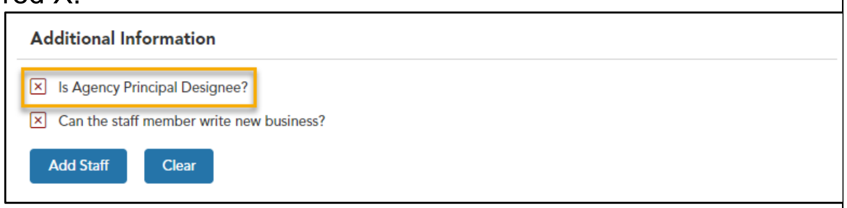
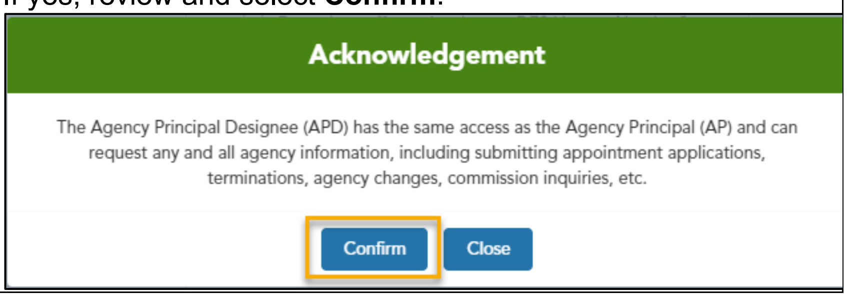
After accessing the Supplemental Application Add Staff screen, add a fully appointed agent following the steps below:

Step	Action
1	Select the **red X** next to the *Does the staff member have a DFS License Number?*  **Result:** The red x turns to a green check mark and the *DFS License Number* field displays.
2	Enter the DFS license number.  **Result:** Appointed license type and personal information, such as name, Social Security number and birthdate, are pulled from DFS records and the applicable fields are gray and prefilled.

Continued on next page

Locations Tab, Continued

Add Staff: Fully Appointed Agent, continued

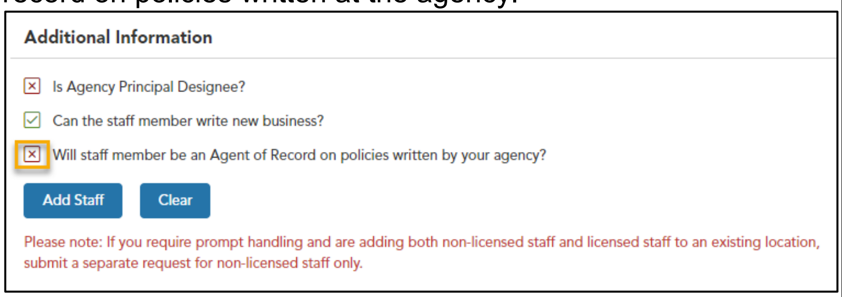
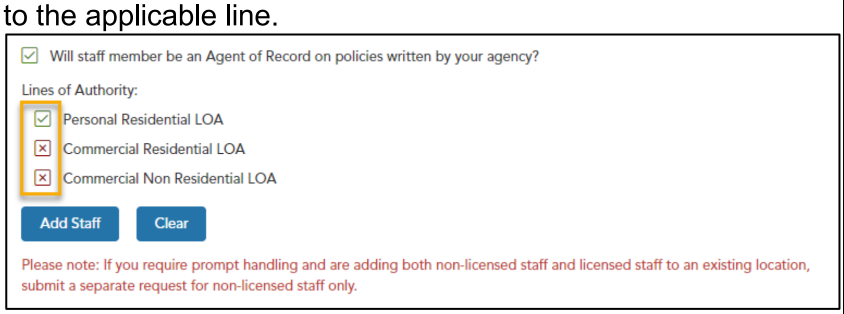
Step	Action
3	Enter other contact information. 
4	Indicate if the new agent is the AP designee by selecting the red X.  If yes, review and select **Confirm**. 

Continued on next page

***Locations* Tab**, Continued

Add Staff: Fully Appointed Agent, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Select the red X to indicate that the agent can write new business.

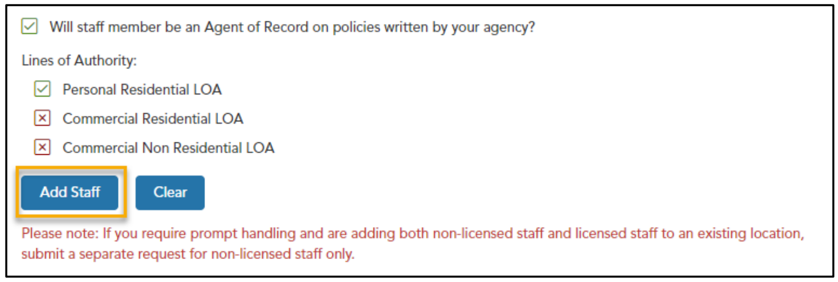
Result: The red X will change to a green check mark. Additional fields will appear.</td></tr>
<tr><td>6</td><td>Select the red X to indicate if the new agent will be an agent of record on policies written at the agency.

Result: The red X will change to a green check mark. Lines of authority will appear.</td></tr>
<tr><td>7</td><td>Indicate the agent’s line of authority by selecting the red X next to the applicable line.

Result: The red X will change to a green check mark.</td></tr>
</table>

Continued on next page

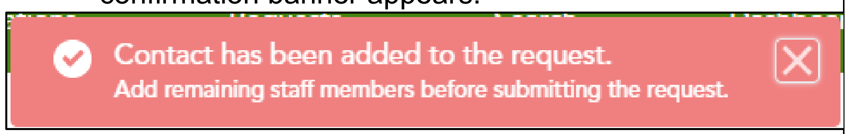
***Locations* Tab**, Continued

Add Staff: Fully Appointed Agent, continued

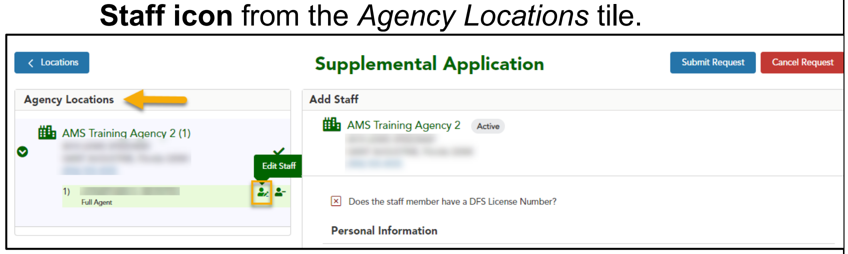
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Select Add Staff.



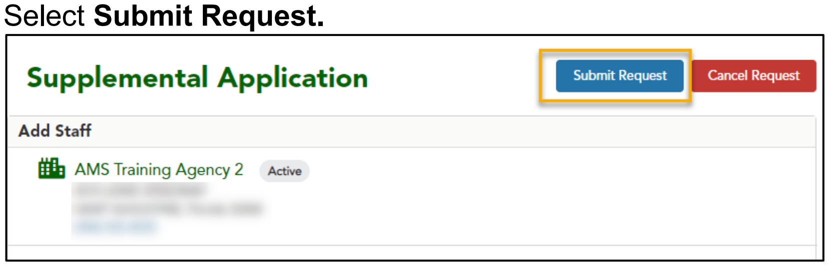
Results:
The agent has been added to the request. A confirmation banner appears.



Additional staff can be added prior to completing the process by repeating steps listed above.
Edits to any staff member can be made to the Supplemental Application by selecting the green Edit Staff icon from the Agency Locations tile.



</td></tr>
<tr><td>9</td><td>Select Submit Request.



Result: The Supplemental Application has been submitted. A confirmation banner appears.</td></tr>
</table>

Continued on next page

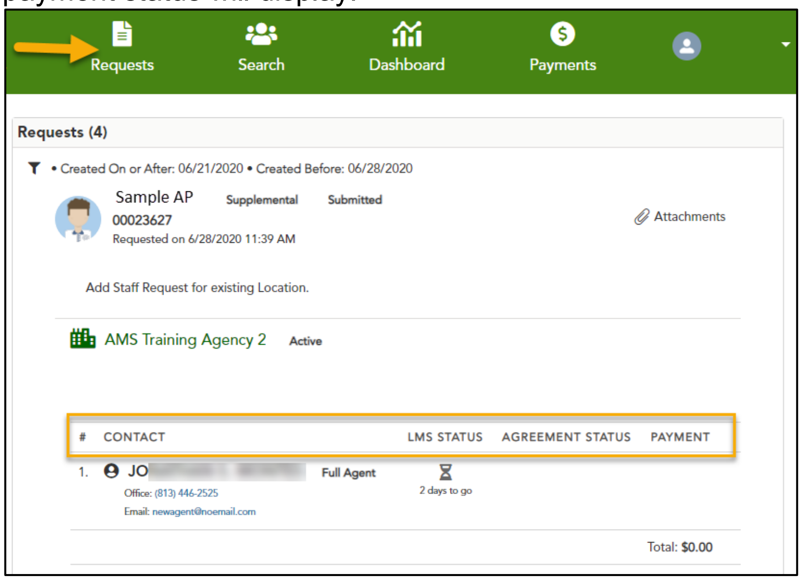
***Locations* Tab**, Continued

Add Staff: Fully Appointed Agent, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>

The *Requests* tab will display, with the *Supplemental Application* request to add staff listed.

The newly requested agent's name, LMS, agreement, and payment status will display.



Results and Additional Actions:
After a supplemental application is submitted, both full and limited agents must complete the following prior to appointment:

- Sign and return the Agent Appointment Agreement within **15 days** of receipt.
- Complete Citizens-assigned *New Agent Onboarding* (NAO) modules, which will be assigned to them following the initial application submission. Required education will need to be completed within **30 days** of assignment.
- Submit a $125 appointment fee for each agent appointed. Fees will be pro-rated for mid-term appointment and due within **15 days**. This fee is due annually and can be paid through myAgency.
- Fees for supplemental applications that are pending payment within 60 days of the renewal date will be included in the renewal balance.

</td></tr>
</table>

Continued on next page

Locations Tab, Continued

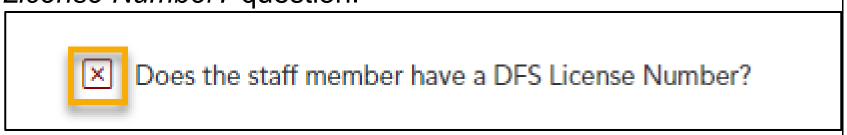
Add Staff: Limited Agent

Limited agents write new business for a fully appointed agent and **do not have their own book of business.**

Limited agents must meet the following requirements to be appointed with Citizens:

- 2-20 or 20-44 Florida resident agent license or a 9-20 or 90-44 nonresident agent license.
- Appointment with at least one authorized insurer writing one or more of the following lines of business:
  - Personal Residential
  - Commercial Residential
  - Commercial Nonresidential Property

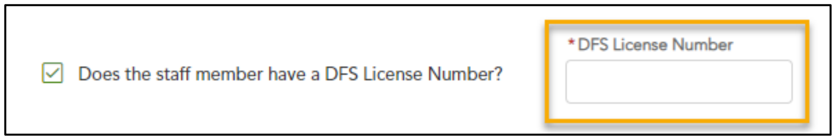
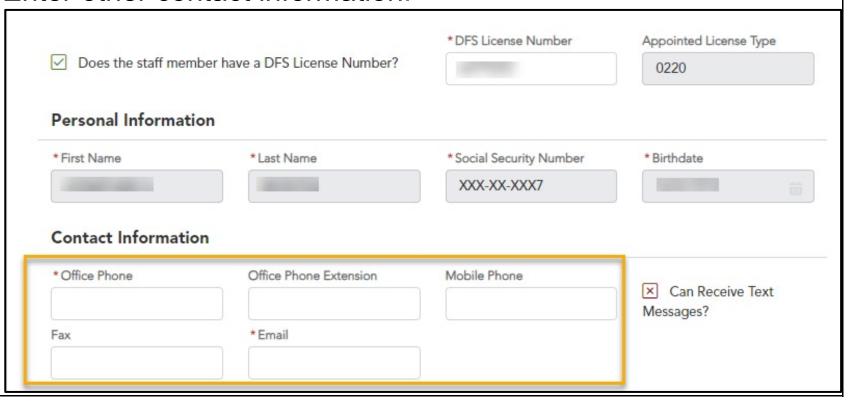
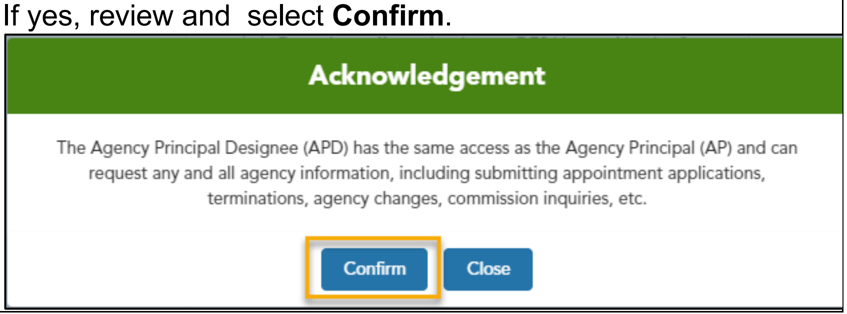
You can add a limited agent via the *Supplemental Application* when adding a new location or from the *Locations* tab in the *Staff* tile.

Step	Action
1	Select the **red X** next to the *Does the staff member have a DFS License Number?* question.  **Result:** The red X will change to a green check mark and the *DFS License Number* field displays.

Continued on next page

Locations Tab, Continued

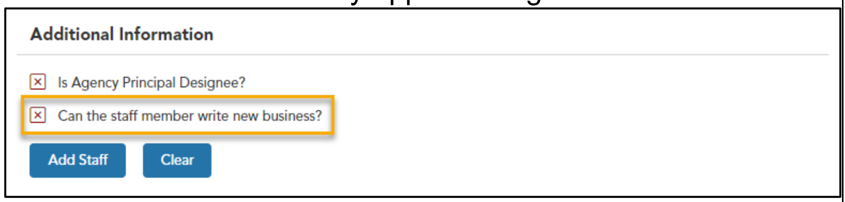
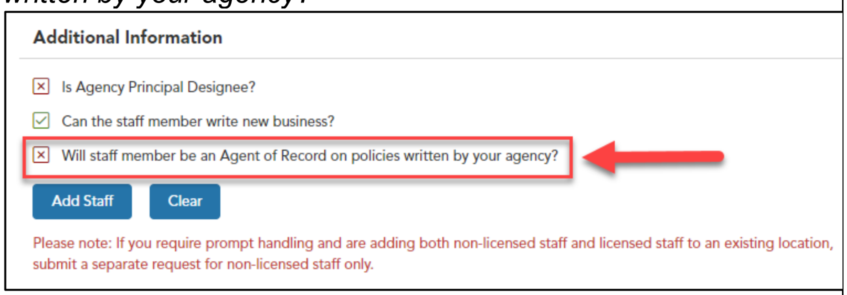
Add Staff: Limited Agent, continued

Step	Action
2	Enter the DFS license number.  **Result:** Appointed license type and personal information, such as name, Social Security number and birthdate, are pulled from DFS records, and the applicable fields are gray and prefilled.
3	Enter other contact information. 
4	Indicate if the agent is the agency principal designee by selecting the red X.  If yes, review and select **Confirm**. 

Continued on next page

Locations Tab, Continued

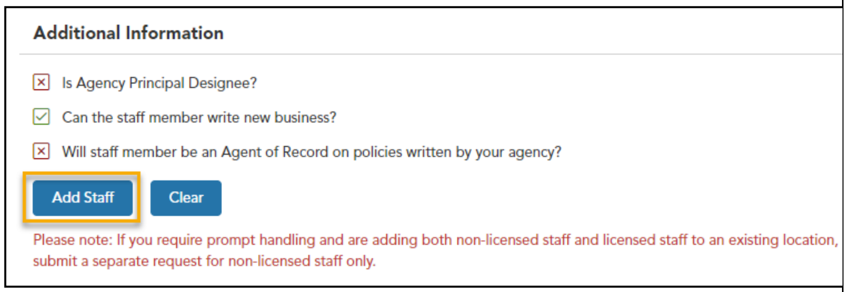
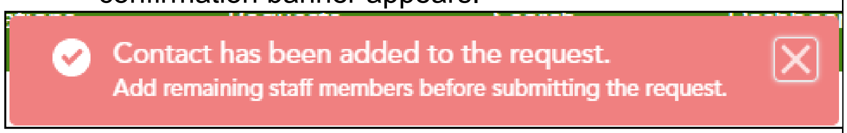
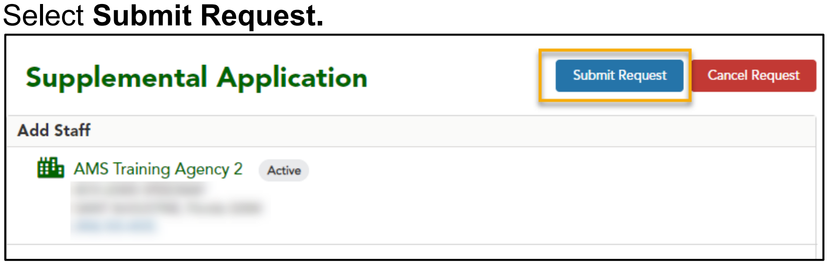
Add Staff: Limited Agent, continued

Step	Action
5	Select the red X to indicate that the limited agent can write new business on behalf of a fully appointed agent.  **Result:** The red X will change to a green check. Additional fields will appear.
6	**Important:** To request appointment for a limited agent, **do not** select *Will staff member be an Agent of Record on policies written by your agency?* 

Continued on next page

Locations Tab, Continued

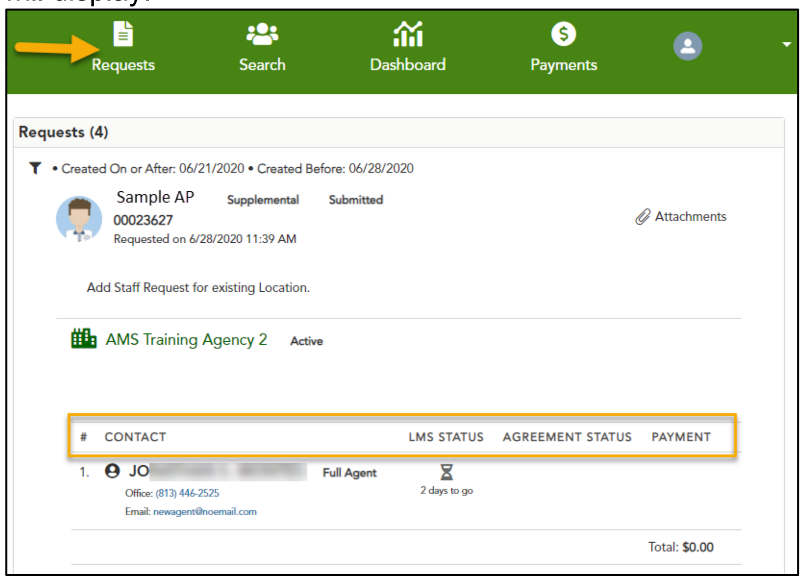
Add Staff: Limited Agent, continued

Step	Action
7	Select **Add Staff.**  **Results:** • The agent has been added to the request. A confirmation banner appears.  • Additional staff can be added prior to completing the process by repeating steps listed above. • Edits to any staff member can be made to the *Supplemental Application* by selecting the green **Edit Staff icon** from the *Agency Locations* tile.
8	Select **Submit Request.**  **Result:** The *Supplemental Application* has been submitted. A confirmation banner appears.

Continued on next page

Locations Tab, Continued

Add Staff: Limited Agent, continued

Step	Action
9	The *Requests* tab will display, with the *Supplemental Application* request listed. The new agent's name, LMS, agreement, and payment status will display.  **Results and Additional Actions:** After a supplemental application is submitted, both full and limited agents must complete the following prior to appointment: • Sign and return the Agent Appointment Agreement within **15 days** of receipt. • Complete Citizens-assigned *New Agent Onboarding* (NAO) modules, which will be assigned to them following the initial application submission. Required education will need to be completed within **30 days** of assignment. • Submit a $125 appointment fee for each agent appointed. Fees will be pro-rated for mid-term appointment and due within **15 days**. This fee is due annually and can be paid through myAgency.

Continued on next page

Locations Tab, Continued

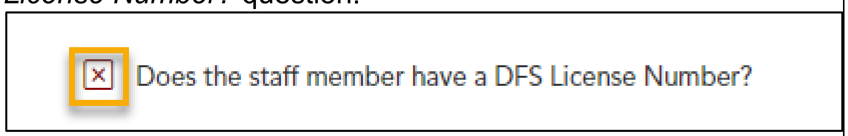
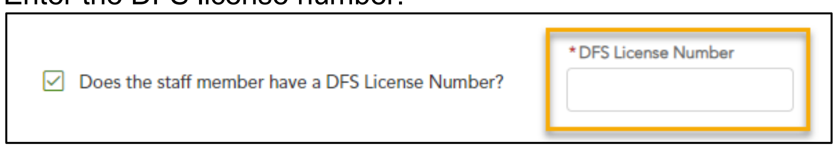
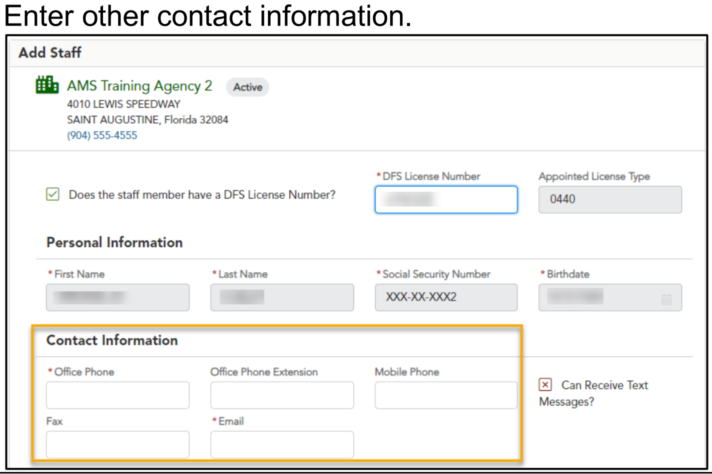
Add Staff: LCR Write and Service

Licensed Customer Representatives (LCRs) assigned to a single location and working on behalf of a fully appointed agent can:

- Write new business
- Services existing business

Only staff holding a 4-40 license can be assigned this appointment type. Appointment agreements, appointment fees, and Citizens-assigned education is not required.

You can add an LCR via the *Supplemental Application* when adding a new location or from the *Locations* tab in the *Staff* tile:

Step	Action
1	Select the **red X** next to the *Does the staff member have a DFS License Number?* question.  **Result:** The red x turns to a green check mark and the *DFS License Number* field displays.
2	Enter the DFS license number.  **Result:** Appointed license type and personal information, such as name, Social Security number and birthdate, are pulled from DFS records, and the applicable fields are gray and prefilled.
3	Enter other contact information. 

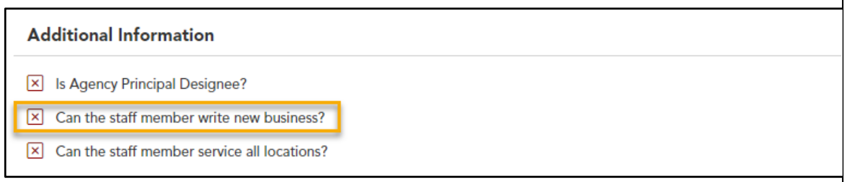
Continued on next page

Locations Tab, Continued

Add Staff: LCR Write and Service, continued

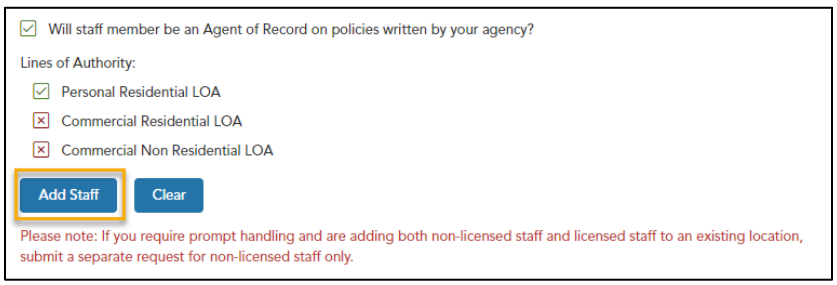
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

Important: To add an LCR who can write new business under an appointed agent, select the red X next to *Can the staff member write new business?*



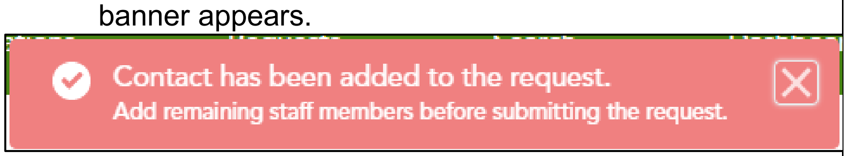
Result: The red X changes to a green check mark and the option for *Can the staff member service all locations?* disappears.
</td></tr>
<tr><td>5</td><td>

Select **Add Staff**.

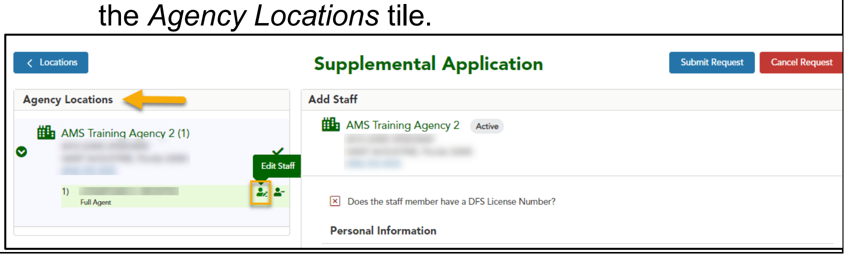


Results:

- The LCR has been added to the request. A confirmation banner appears.



- Additional staff can be added prior to completing the process by repeating steps listed above.
- Edits to any staff member can be made to the *Supplemental Application* by selecting **Edit Staff** from the *Agency Locations* tile.

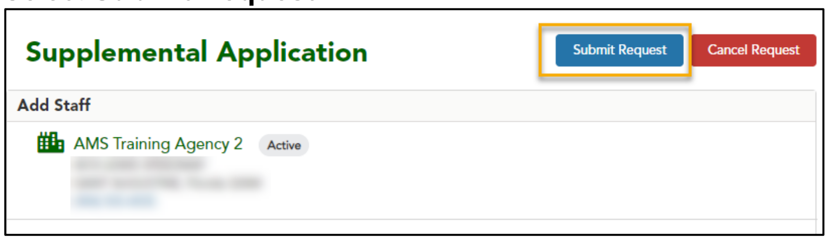


</td></tr>
</table>

Continued on next page

Locations Tab, Continued

Add Staff: LCR Write and Service, continued

Step	Action
6	Select **Submit Request.**  **Result:** The Supplemental Application has been submitted. A confirmation banner appears.
7	The *Requests* tab will display, with the *Supplemental Application* to add requested staff listed. The new LCR's name and status will display. A confirmation email will be sent to the AP, APD and new staff member.

Continued on next page

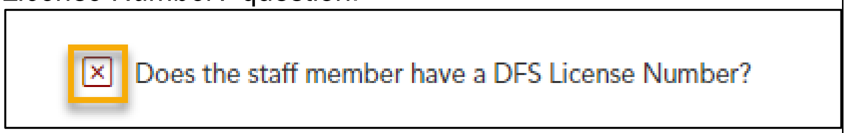
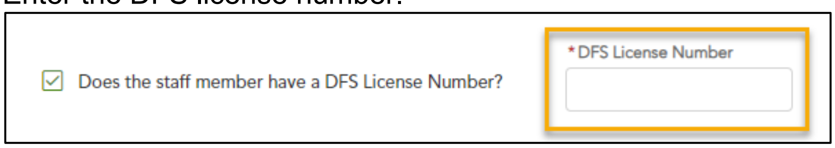
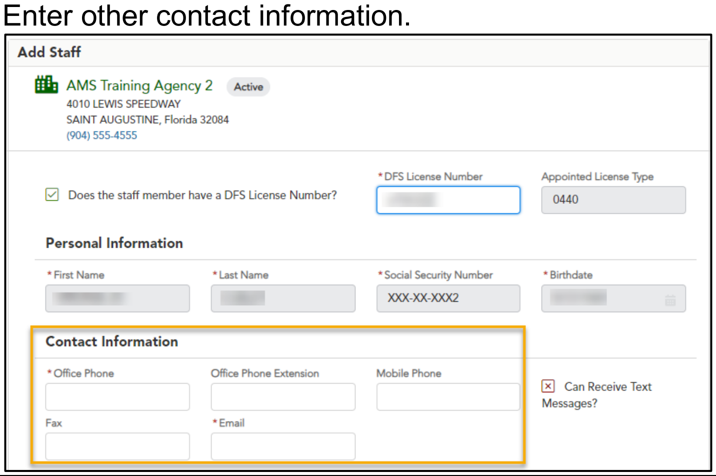
***Locations* Tab**, Continued

Add Staff: Service-Only LCR

You can assign an LCR to all agency locations; however, they are limited to servicing existing business at these locations. Staff assigned this appointment type are prohibited from writing new business.

Staff holding a 4-40 license can be assigned this appointment type. Appointment agreements, appointment fees, and Citizens-assigned education is not required.

You can add a service-only LCR via the *Supplemental Application* when adding a new location or from the *Locations* tab in the *Staff* tile.

Step	Action
1	Select the **red X** next to the *Does the staff member have a DFS License Number?* question.  **Result:** The red x turns to a green check mark *DFS License Number* field displays.
2	Enter the DFS license number.  **Result:** Appointed license type and personal information, such as name, Social Security number and birthdate, are pulled from DFS records, and the applicable fields are gray and prefilled.
3	Enter other contact information. 

Continued on next page

Locations Tab, Continued

Add Staff: Service-Only LCR, continued

Step	Action
4	Select the **red X** next to *Can the staff member service all locations?* 

Continued on next page

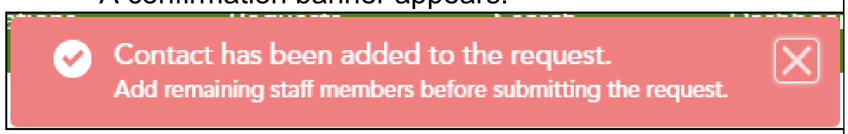
Locations Tab, Continued

Add Staff: Service-Only LCR, continued

Step	Action
5	Select **Add Staff.**

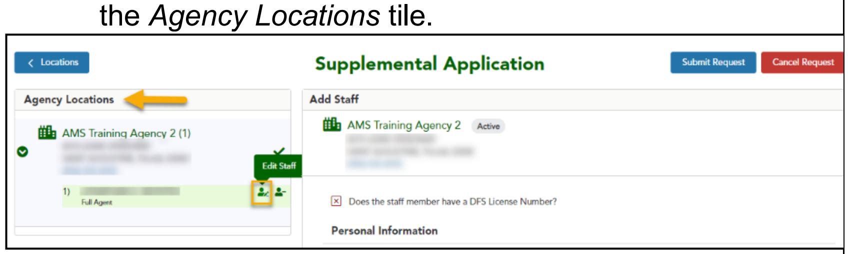
Results:

- The Service-Only LCR has been added to the request. A confirmation banner appears.



- Additional staff can be added prior to completing the process by repeating steps listed above.

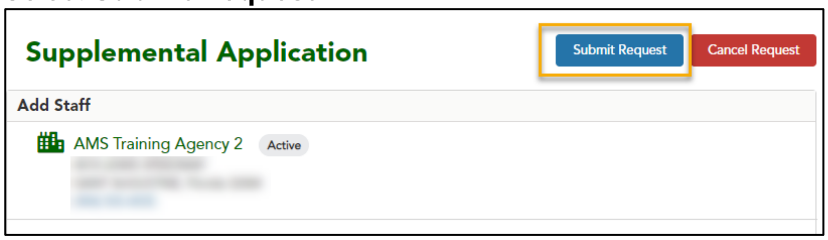
- Edits to any staff member can be made to the *Supplemental Application* by selecting **Edit Staff** from the *Agency Locations* tile.



Continued on next page

Locations Tab, Continued

Add Staff: Service-Only LCR, continued

Step	Action
6	Select **Submit Request.**  **Result:** The Supplemental Application has been submitted. A confirmation banner appears.
7	The *Requests* tab will display, with the *Supplemental Application* request to add staff will be listed. The newly added LCR's name and status will display. A confirmation email will be sent to the AP, APD and new staff member.

Continued on next page

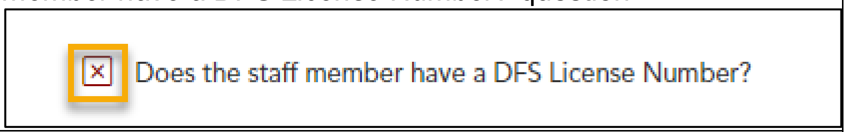
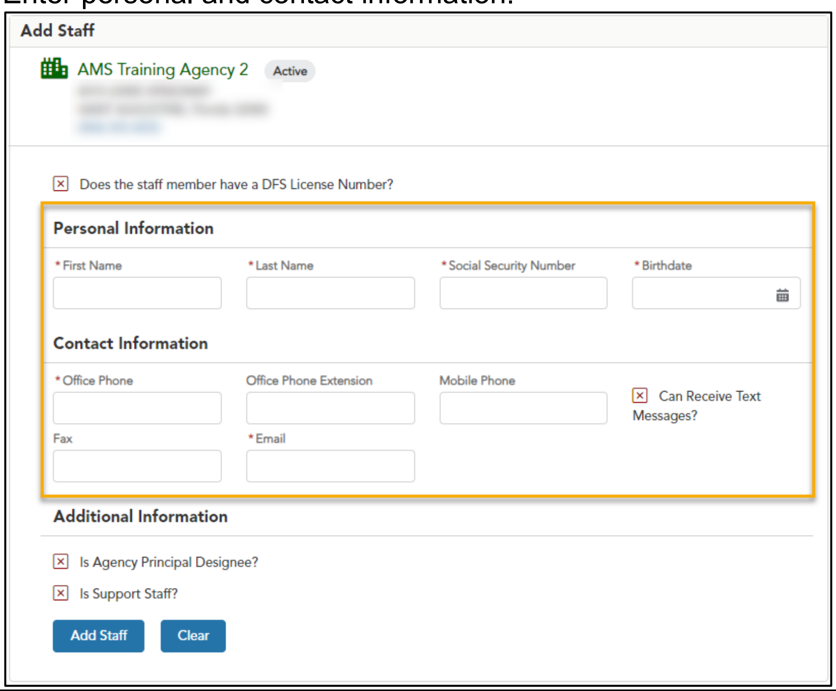
Locations Tab, Continued

Add Staff: View-Only Support

Support staff can be assigned a view-only access to new and existing business written at all agency locations.

Support staff do not require a DFS license. Appointment agreements, appointment fees, and Citizens-assigned education are also not required.

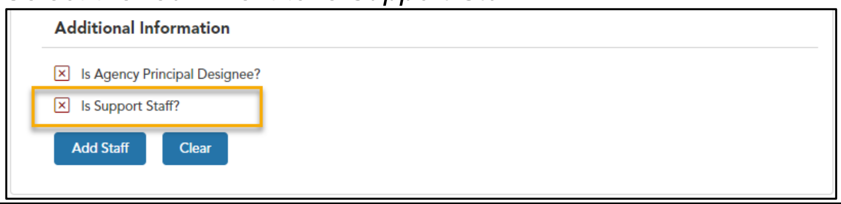
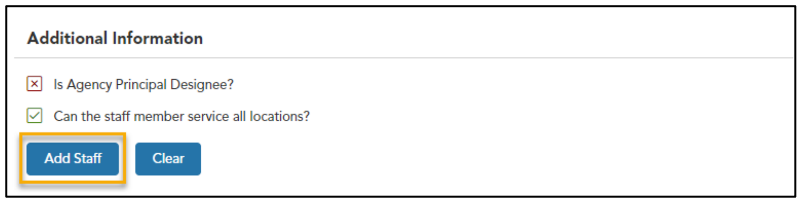
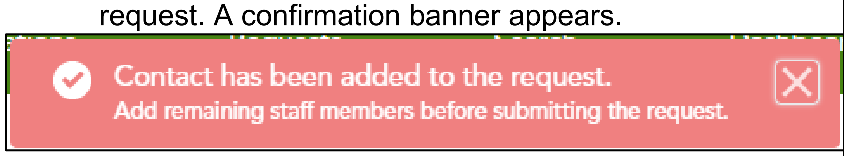
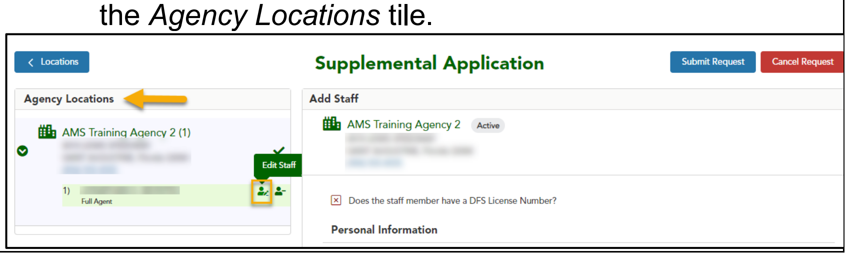
After accessing the Supplemental Application Add Staff screen, add view-only support staff following the steps below:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Important: Do not select the red X next to the Does the staff member have a DFS License Number? question.

</td></tr>
<tr><td>2</td><td>Enter personal and contact information.

</td></tr>
</table>

Continued on next page

Locations Tab, Continued

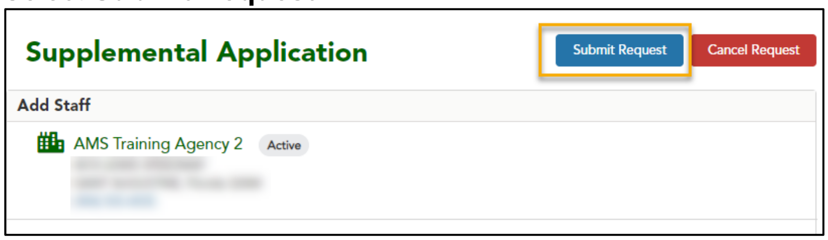
Add Staff: View-Only Support, continued

Step	Action
3	Select the red X next to *Is Support Staff?* 
4	Select **Add Staff.**  **Results:** • The newly added support staff has been added to the request. A confirmation banner appears.  • Additional staff can be added prior to completing the process by repeating steps listed above. • Edits to any staff member can be made to the *Supplemental Application* by selecting **Edit Staff** from the *Agency Locations* tile. 

Continued on next page

Locations Tab, Continued

Add Staff: View-Only Support, continued

Step	Action
5	Select **Submit Request.**  **Result:** The Supplemental Application has been submitted. A confirmation banner appears.
6	The *Requests* tab will display, with the Supplemental Application request to add staff listed. The new support staff's name and status will display. A confirmation email will be sent to the AP, APD and new staff member.

Continued on next page

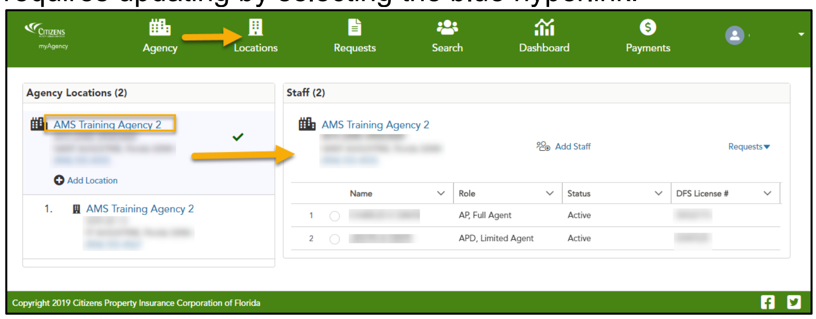
Locations Tab, Continued

Request: Edit Agency Location Information

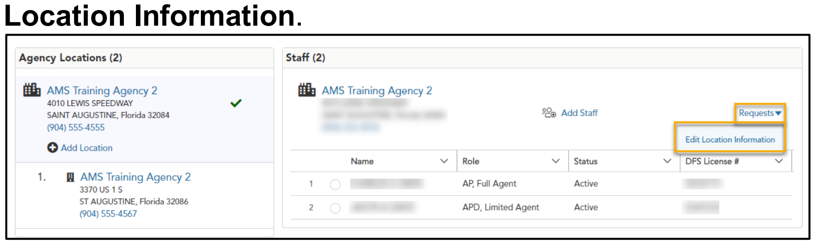
If an agency location, phone, fax, email address or other basic information needs updating, submit a request to *Edit Agency Location Information*.

To submit the *Edit Agency Location Information* request:

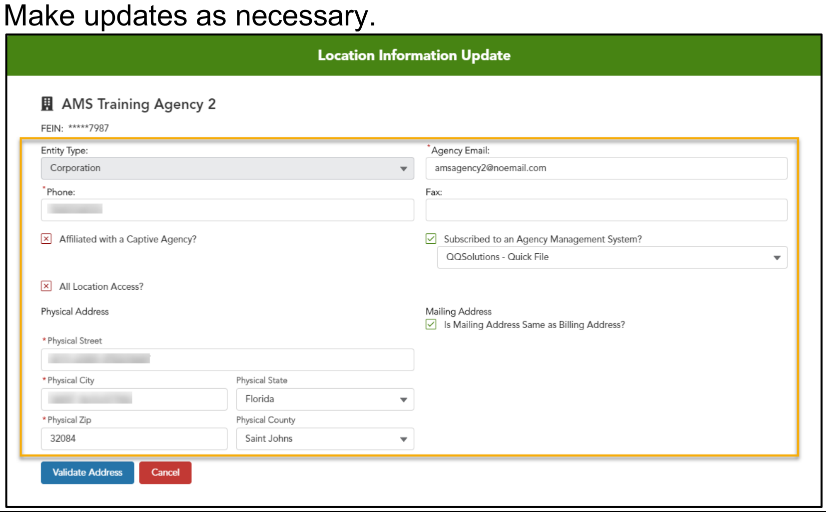
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Locations tab, then expand the location that requires updating by selecting the blue hyperlink.



Result: That location's Staff tile expands.</td></tr>
<tr><td>2</td><td>Select the Requests drop-down menu, then select Edit Location Information.



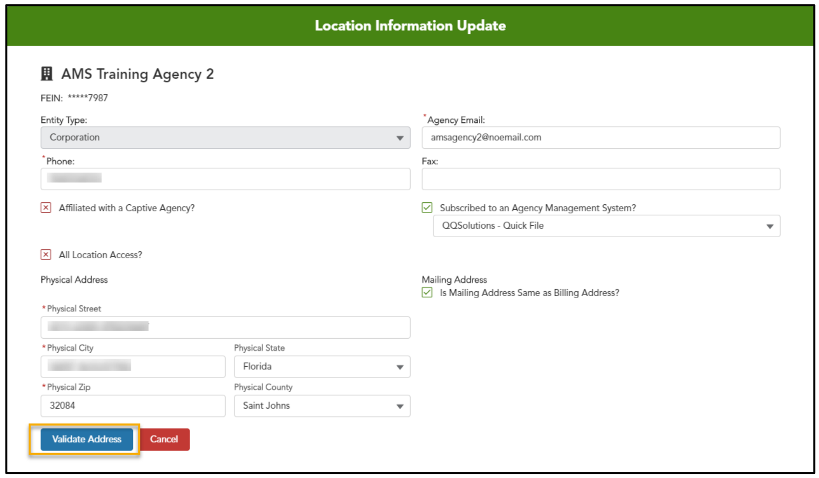
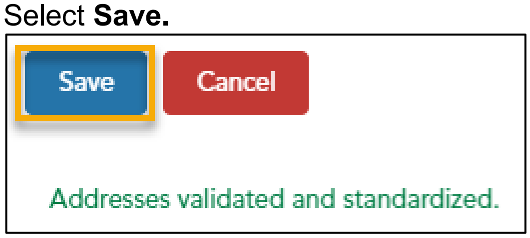
Result: The Location Information Update screen displays.</td></tr>
<tr><td>3</td><td>Make updates as necessary.


</td></tr>
</table>

Continued on next page

Locations Tab, Continued

Request: Edit Agency Location Information, continued

Step	Action
4	Select **Validate Address.**  **Result:** Address is validated and standardized.
5	Select **Save.**  **Result:** A confirmation banner will display, and the status of the request can be viewed on the *Requests* tab.

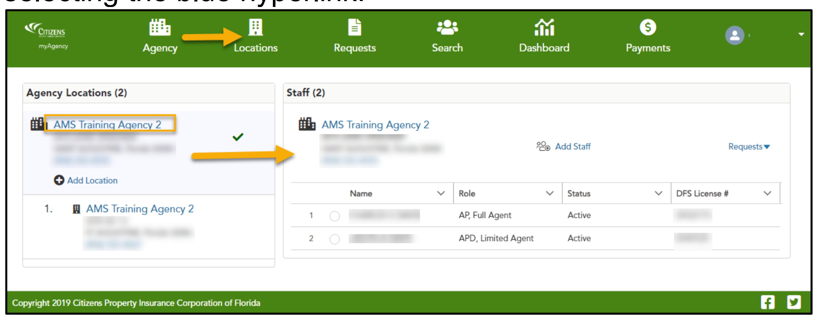
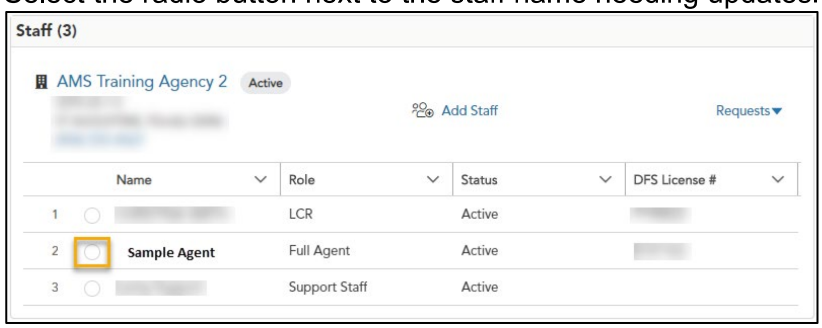
Continued on next page

Locations Tab, Continued

Request: Staff Information Change

Staff information, such as location, name and contact information can be updated by submitting the *Staff Information Change Request*.

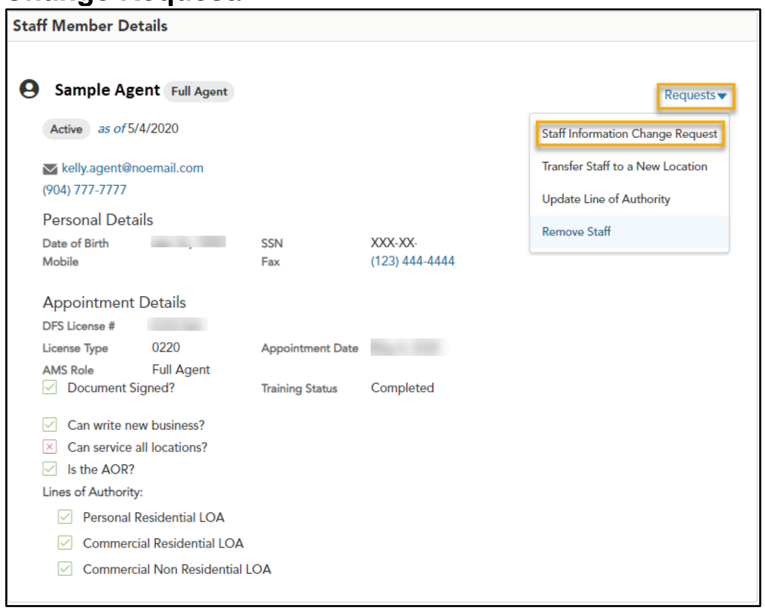
To update staff information:

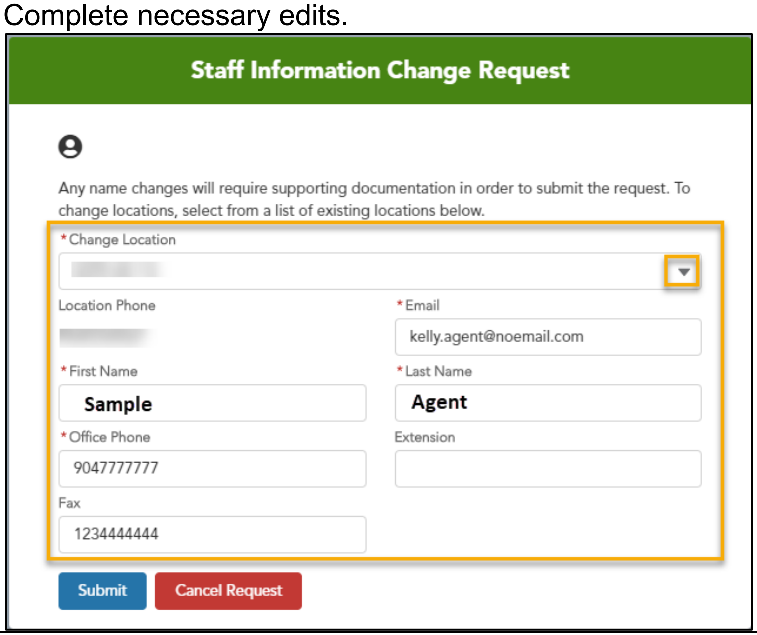
Step	Action
1	Access the *Locations* tab, then expand the staff's location by selecting the blue hyperlink.  **Result:** That location's *Staff* tile expands.
2	Select the radio button next to the staff name needing updates.  **Result:** The *Staff Member Details* screen displays.

Continued on next page

***Locations* Tab**, Continued

Request: Staff Information Change, continued

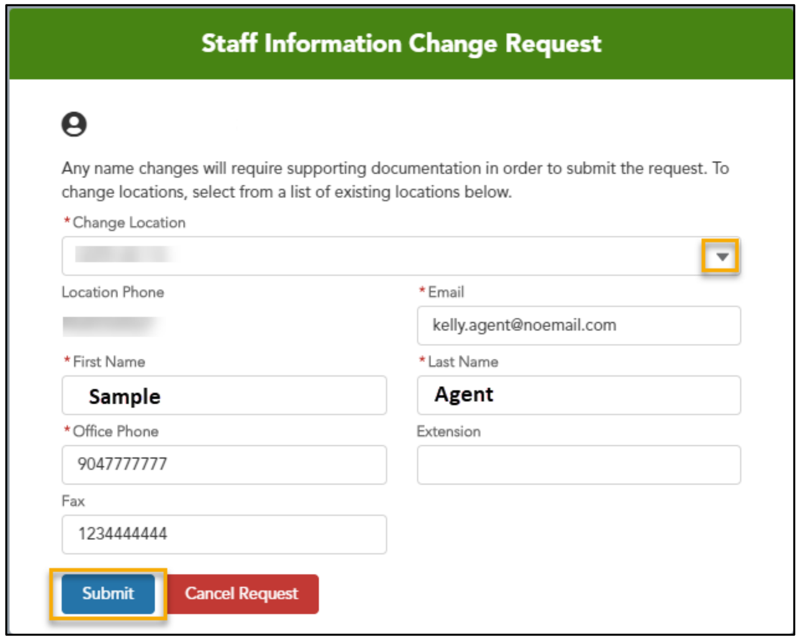
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Select the Requests drop-down menu, then Staff Information Change Request.


Result: The Staff Information Change Request screen displays.</td></tr>
<tr><td>4</td><td>Complete necessary edits.

</td></tr>
</table>

Continued on next page

Locations Tab, Continued

Request: Staff Information Change, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Select Submit.


Result: A confirmation banner will display, and the status of the request can be viewed on the Requests tab.</td></tr>
</table>

Continued on next page

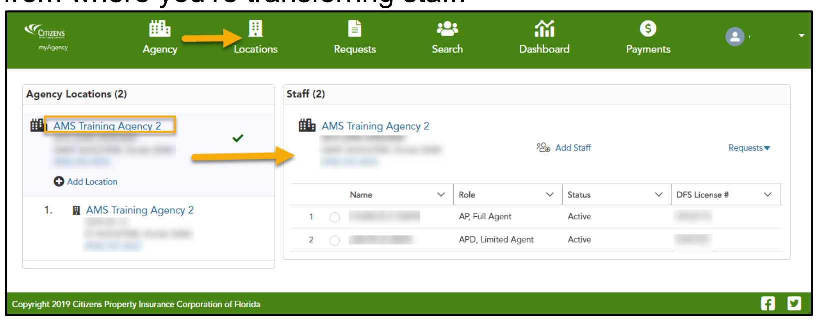
Locations Tab, Continued

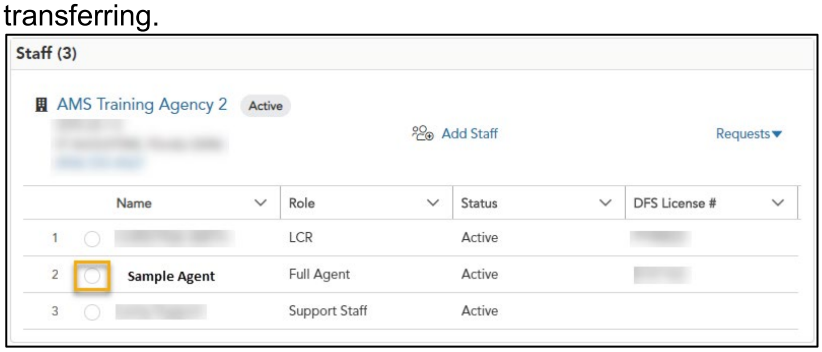
Request: Transfer Staff to a New Location

If a new agency location with a fully appointed agent is added, existing staff can be transferred to the new location using the *Transfer Staff to New Location* request.

Note: Each location must have a fully appointed agent on staff. If the only fully appointed agent is removed, the location will be deactivated

To request staff transferred to a new location:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Locations tab, then select the location’s hyperlink from where you’re transferring staff.


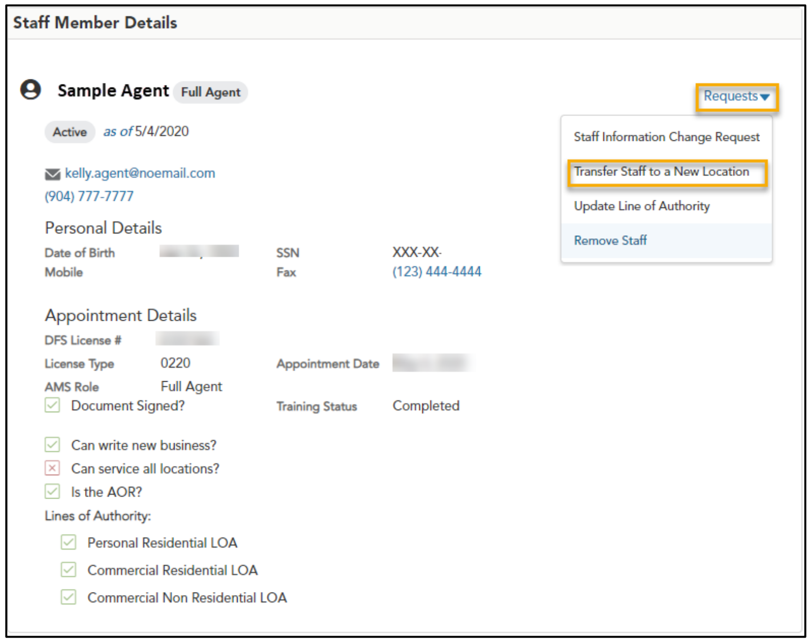
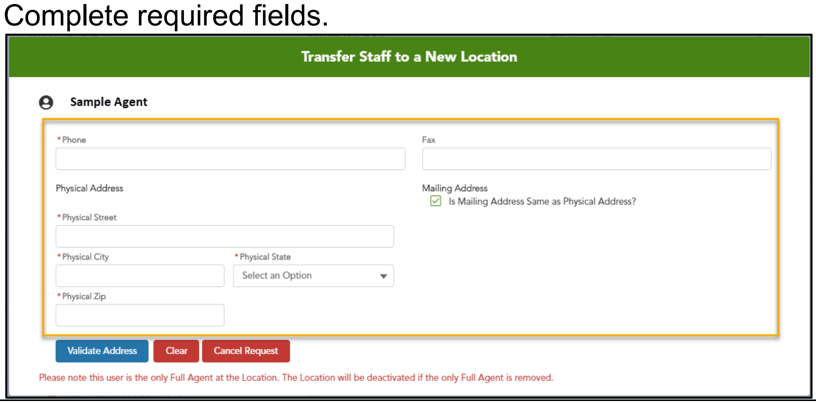
Result: That location’s Staff tile expands.</td></tr>
<tr><td>2</td><td>Select the radio button next to the staff that requires transferring.


Result: The Staff Member Details screen displays.</td></tr>
</table>

Continued on next page

Locations **Tab**, Continued

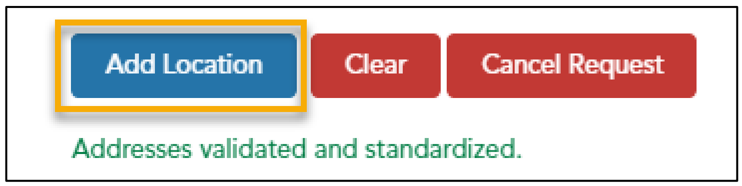
Request: Transfer Staff to a New Location, continued

Step	Action
3	Select the **Requests** drop-down menu, then **Transfer Staff to New Location.**  **Result:** The *Transfer Staff to a New Location* screen displays.
4	Complete required fields. 

Continued on next page

Locations Tab, Continued

Request: Transfer Staff to a New Location, continued

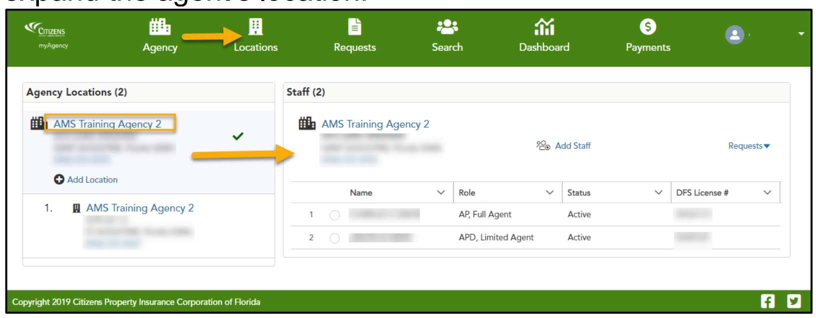
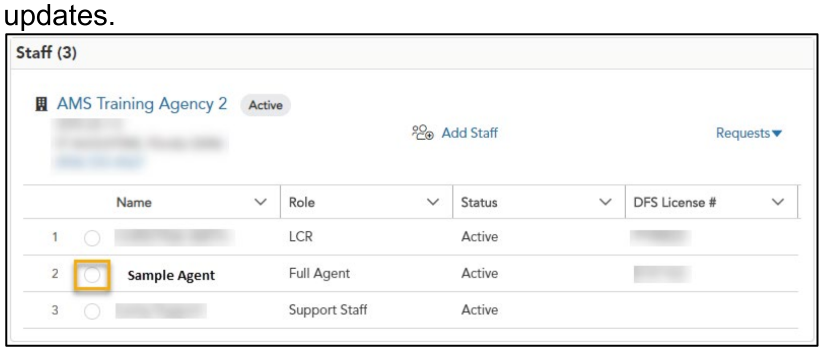
Step	Action
5	Select **Validate Address.**  **Result:** Address is validated and standardized.
6	Select **Add Location.**  **Result:** A confirmation banner will display, and the status of the request can be viewed on the *Requests* tab.

Continued on next page

Locations Tab, Continued

Request: Update Line of Authority

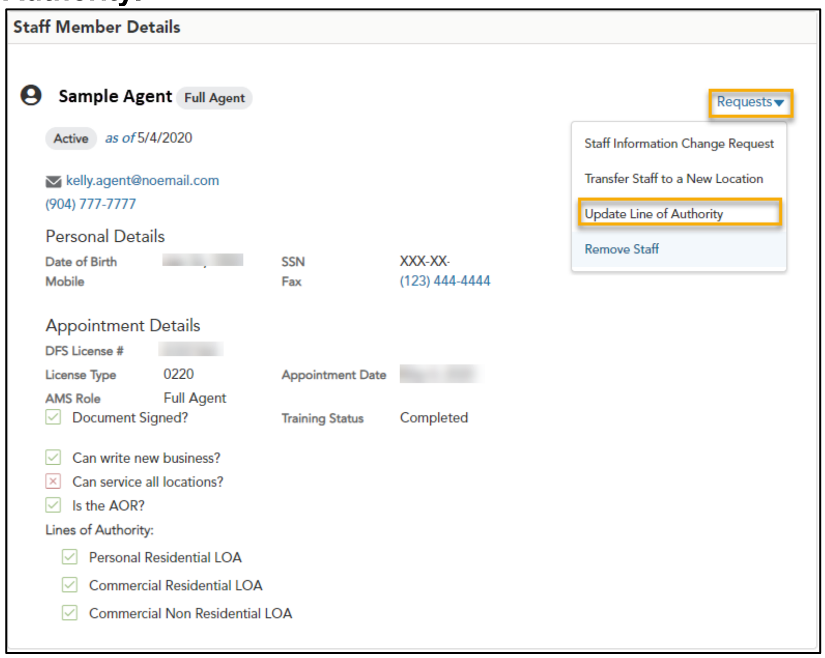
You can request to updates the line(s) of authority for fully appointed and limited agents by following the steps below.

Step	Action
1	Access the *Locations* tab, then selecting the blue hyperlink to expand the agent's location.  **Result:** That location's *Staff* tile expands.
2	Select the radio button next to the staff name that requires updates.  **Result:** The *Staff Member Details* screen displays.

Continued on next page

***Locations* Tab**, Continued

Request: Update Line of Authority, continued

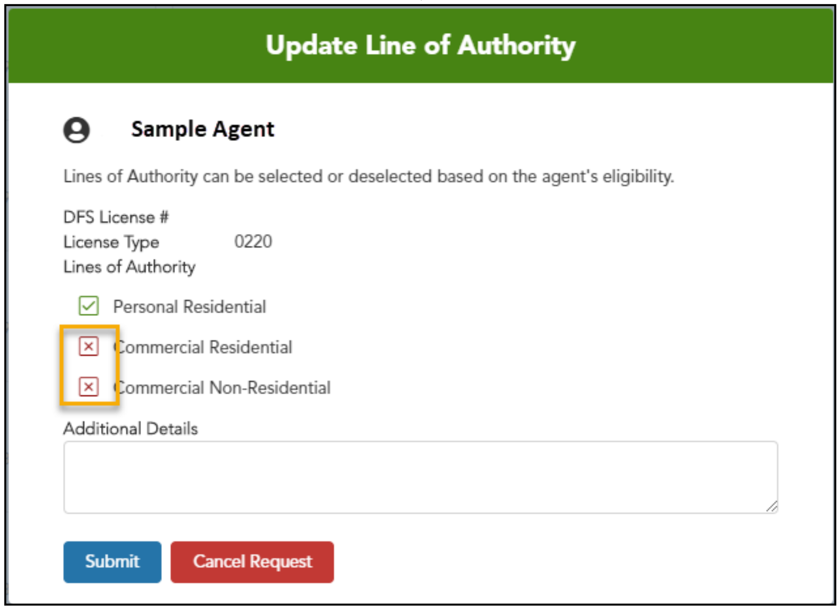
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Select the Requests drop-down menu, then Update Line of Authority.


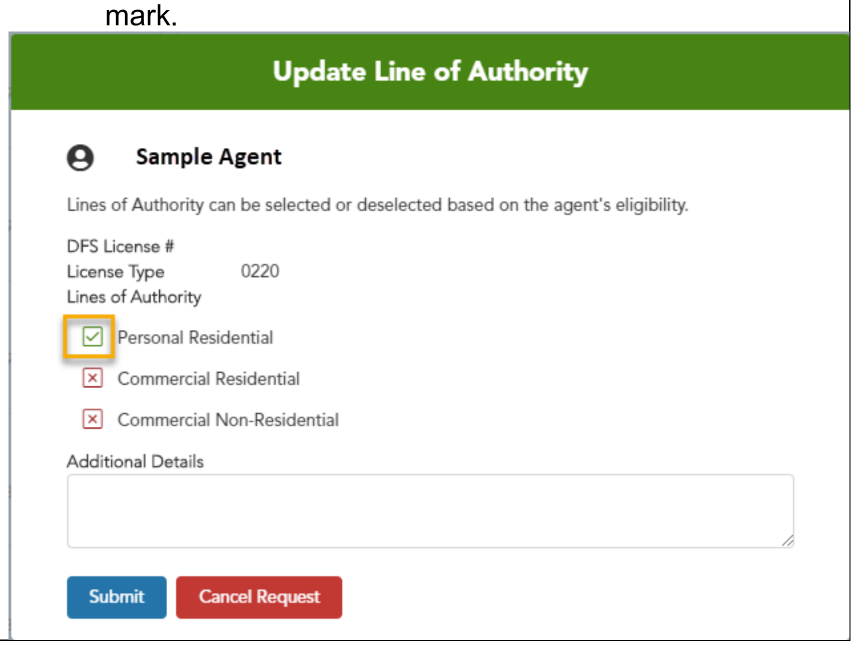
Result: The Update Line of Authority screen displays.</td></tr>
</table>

Continued on next page

***Locations* Tab**, Continued

Request: Update Line of Authority, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>A green check mark indicates the agent’s current line of authority.
To add an additional line, select the red X.


To remove a line of authority, select the green check mark.


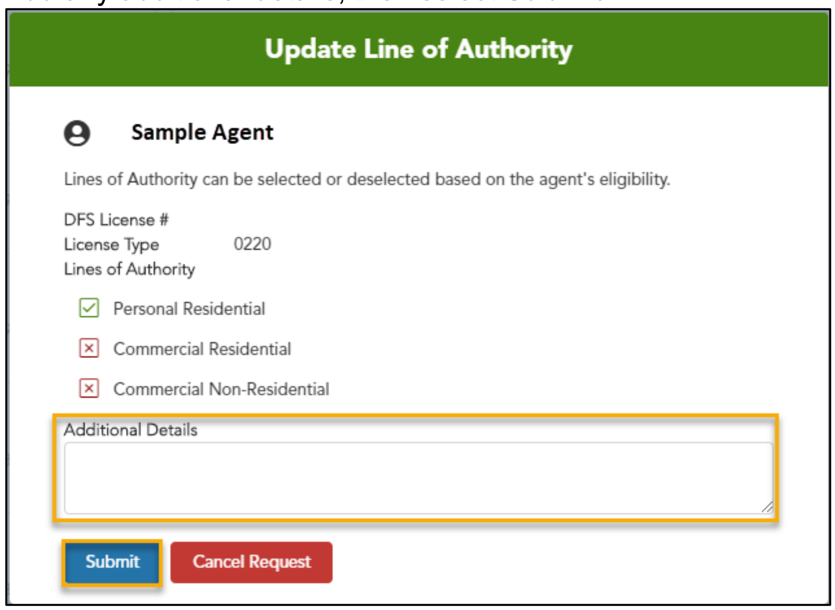
</td></tr>
</table>

Continued on next page

***Locations* Tab**, Continued

Request: Update Line of Authority, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Add any additional details, then select Submit.



Result: A confirmation banner will display, and the status of the request can be viewed on the Requests tab.</td></tr>
</table>

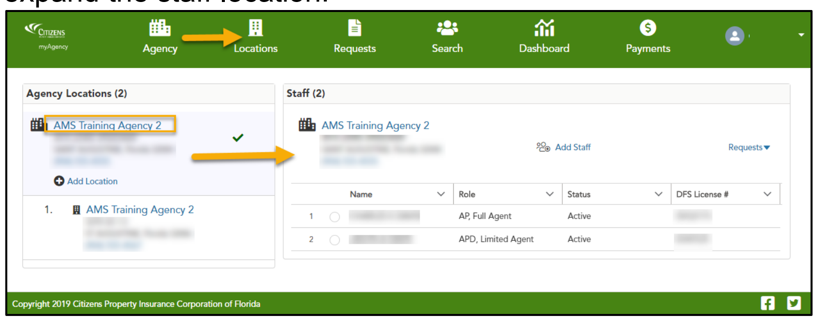
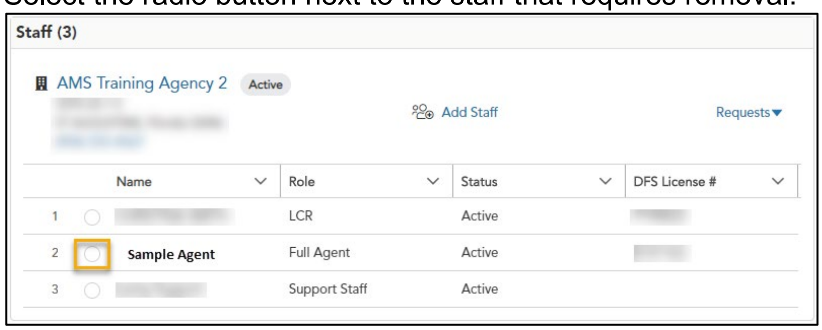
Continued on next page

Locations Tab, Continued

Request: Remove Staff

The steps to remove staff will vary based on role and assigned book of business.

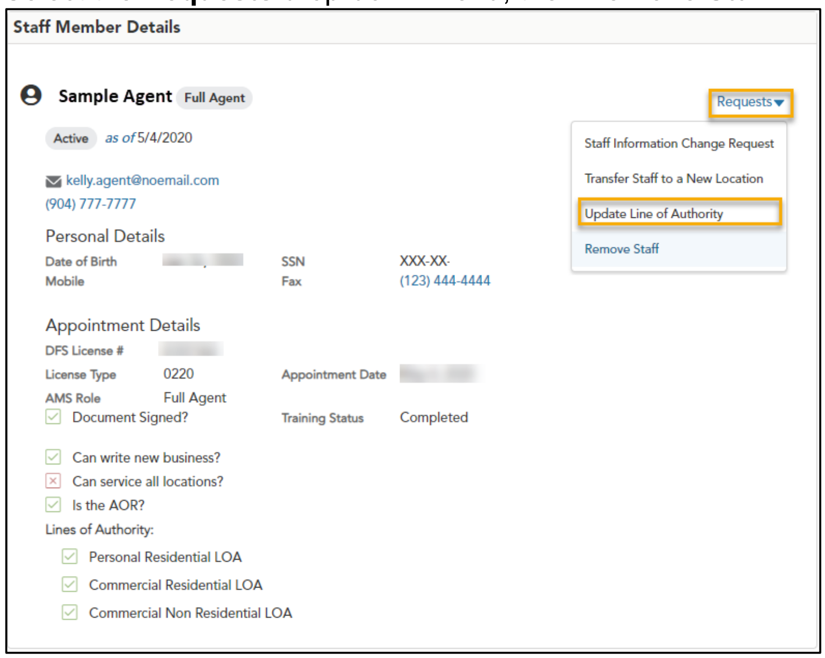
To submit a *Remove Staff* request:

Step	Action
1	Access the *Locations* tab, then select the blue hyperlink to expand the staff location.  **Result:** That location's *Staff* tile expands.
2	Select the radio button next to the staff that requires removal.  **Result:** The *Staff Member Details* screen displays.

Continued on next page

Locations Tab, Continued

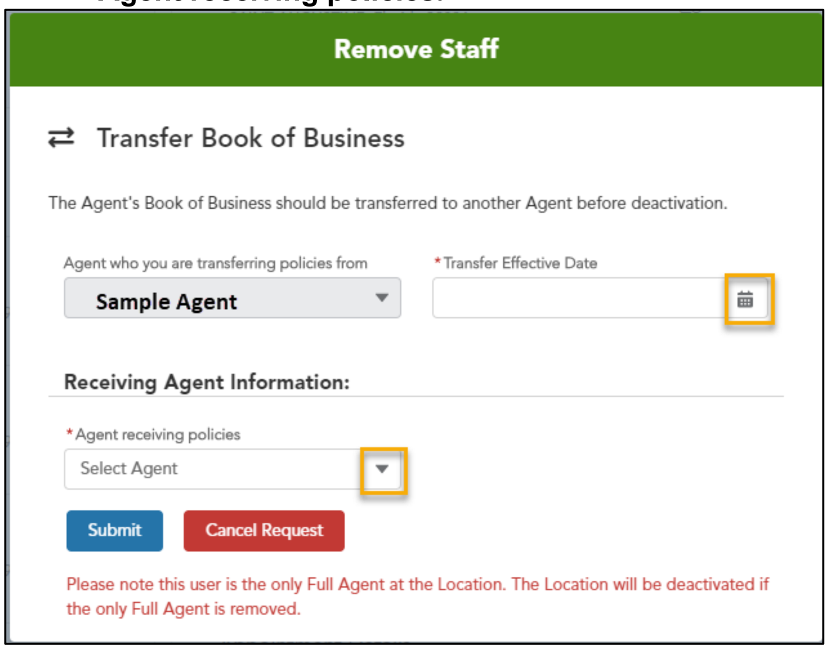
Request: Remove Staff, continued

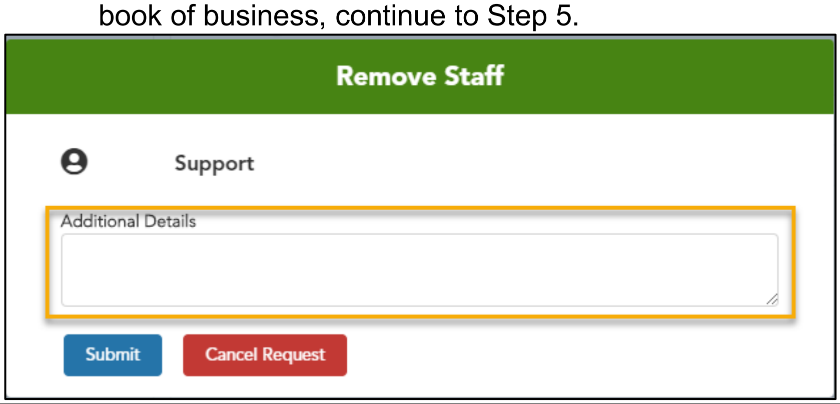
Step	Action
3	Select the **Requests** drop-down menu, then **Remove Staff.**  **Result:** The *Remove Staff* screen displays.

Continued on next page

Locations Tab, Continued

Request: Remove Staff, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Remove Staff screen will vary based on role of the staff member being removed:
If the staff member being removed is a fully appointed agent, their book of business must be transferred. Indicate the Transfer Effective Date, then select the Agent receiving policies.


If the staff member being removed does not have a book of business, continue to Step 5.


</td></tr>
</table>

Continued on next page

Locations Tab, Continued

Request: Remove Staff, continued

Step	Action
5	Select **Submit.**  **Result:** A confirmation banner will display, and the status of the request can be viewed on the *Requests* tab.

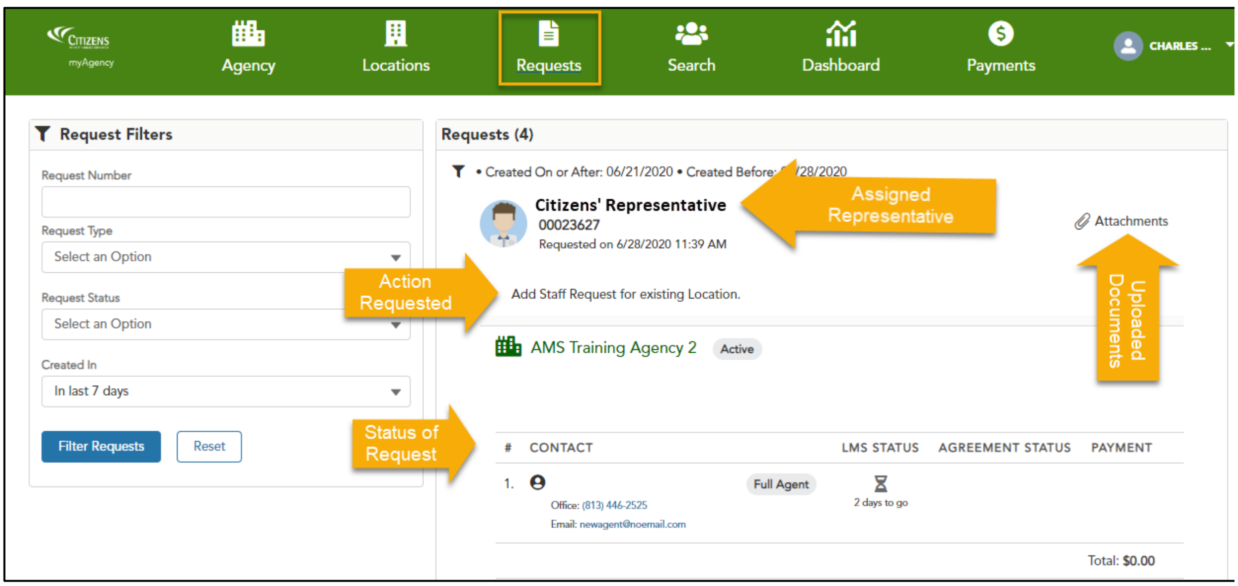
Requests Tab

Overview

APs can check the real-time status of any submitted request.

Each request record includes, if applicable:

- The Citizens' representative assigned with reviewing and/or processing the request or, if auto-approved, the AP or APD that submitted the request.
- A request (case) number
- The type and status of request
- Any attachments



Continued on next page

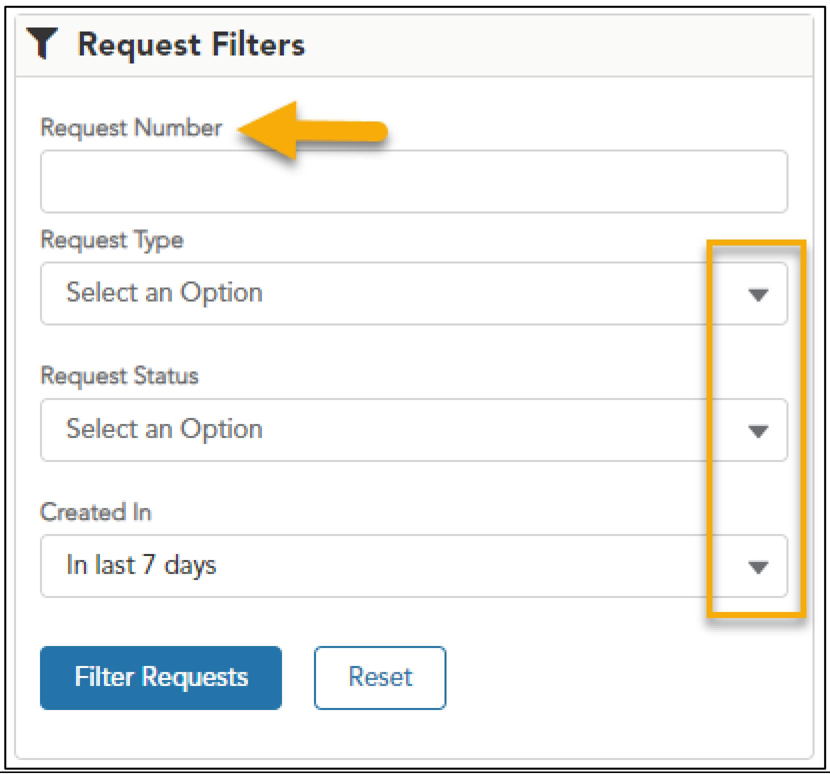
Requests Tab, Continued

Filtering Requests

The *Requests* list can be filtered by:

- Request Number
- Request Type
- Request Status
- Date range for submitted requests

To sort the requests list:

Step	Action
1	Select the appropriate Request Filters using the and drop-down menus. 

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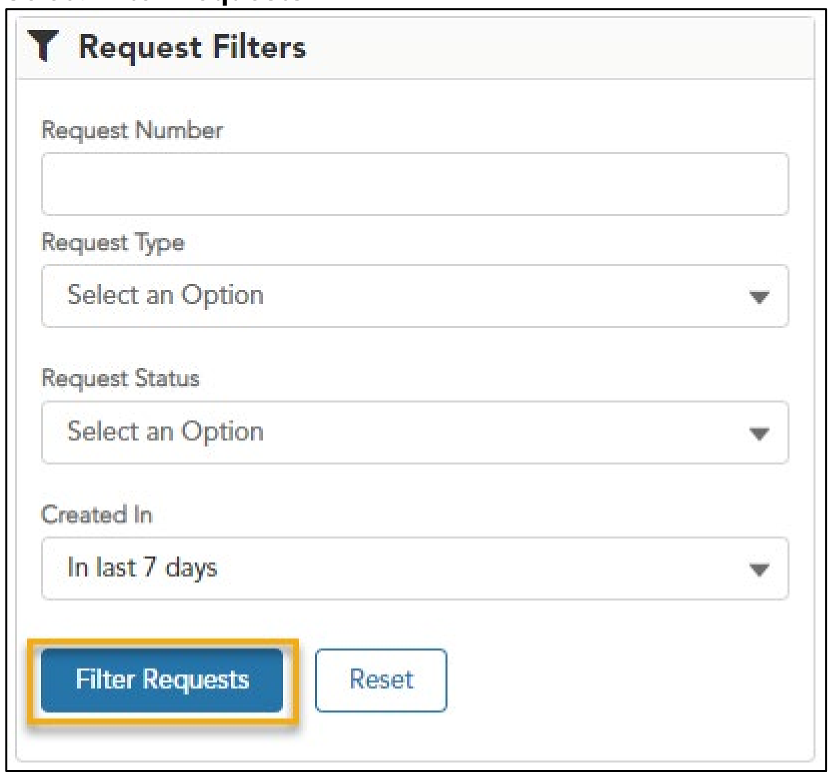
***Requests* Tab**, Continued

Filtering Requests, continued

Step	Action
2	Select **Filter Requests.**  **Result:** A list of filtered requests display.

Search Tab

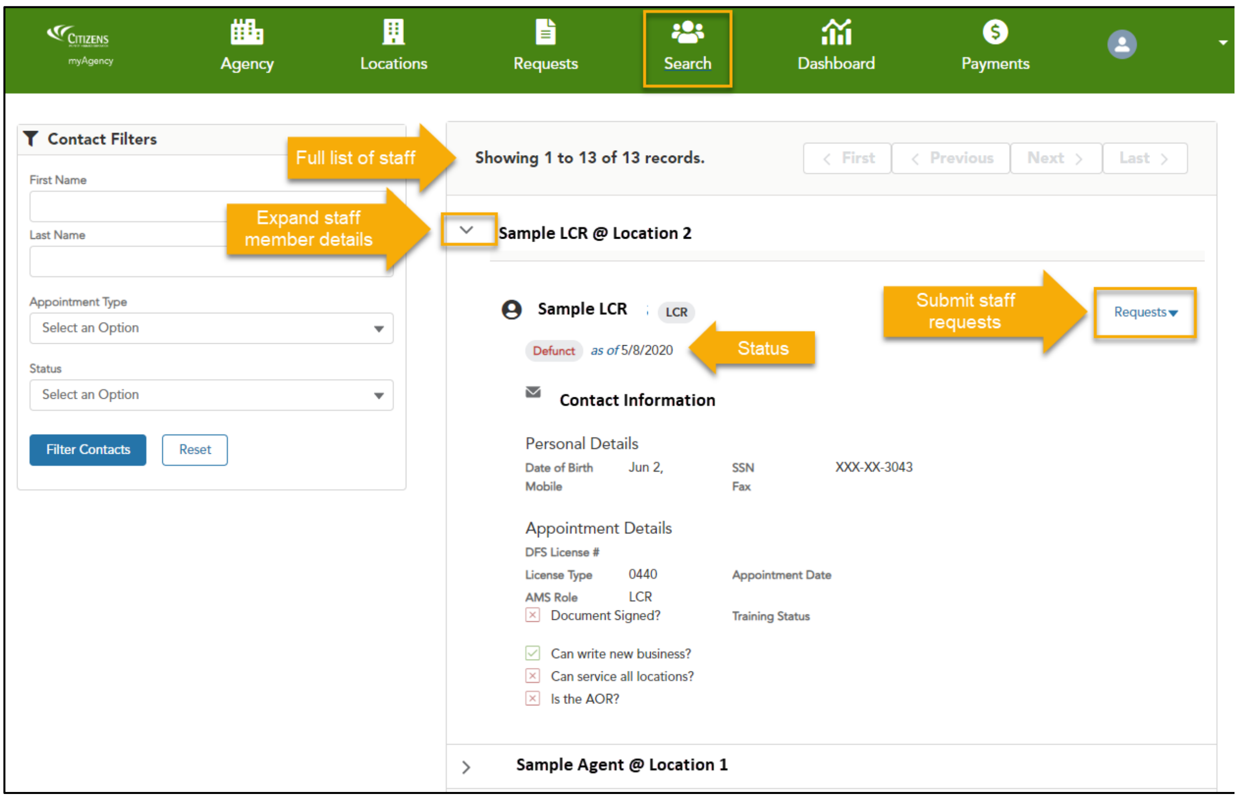
Overview

The *Search* tab is a quick and easy way to locate and edit staff and includes multiple filters to make the search efficient. Filter staff by:

- Name
- Appointment type
- Status

Once located, APs can submit staff change requests from the *Search* tab, including:

- *Staff Information Change Request*
- *Transfer Staff to a New Location*
- *Update Line of Authority*
- *Remove Staff*



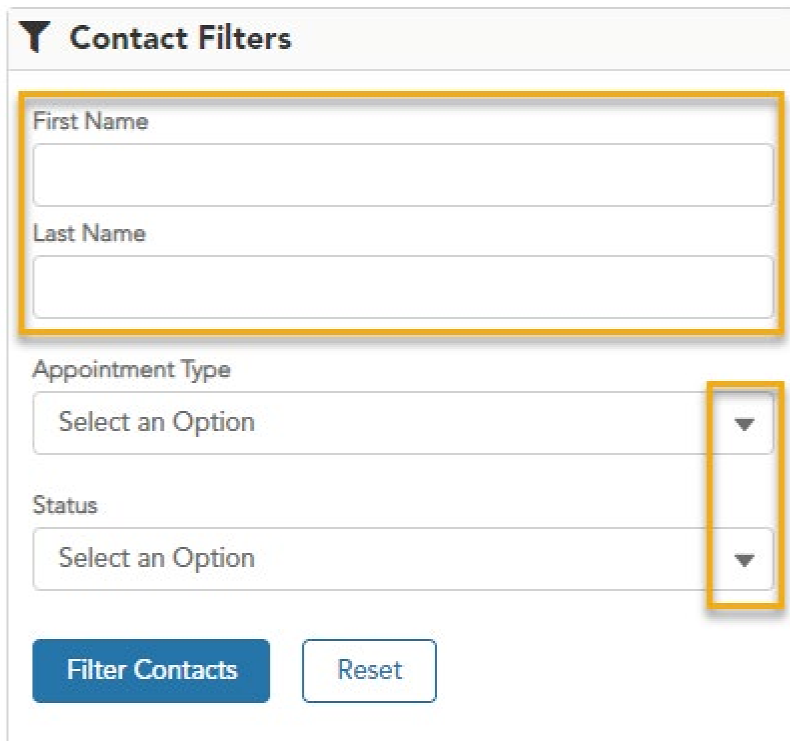
Continued on next page

Search Tab, Continued

Filtering Search Results

Staff records can be filtered by:
- First and last name
- Appointment type
- Status

To sort the *staff records list*:

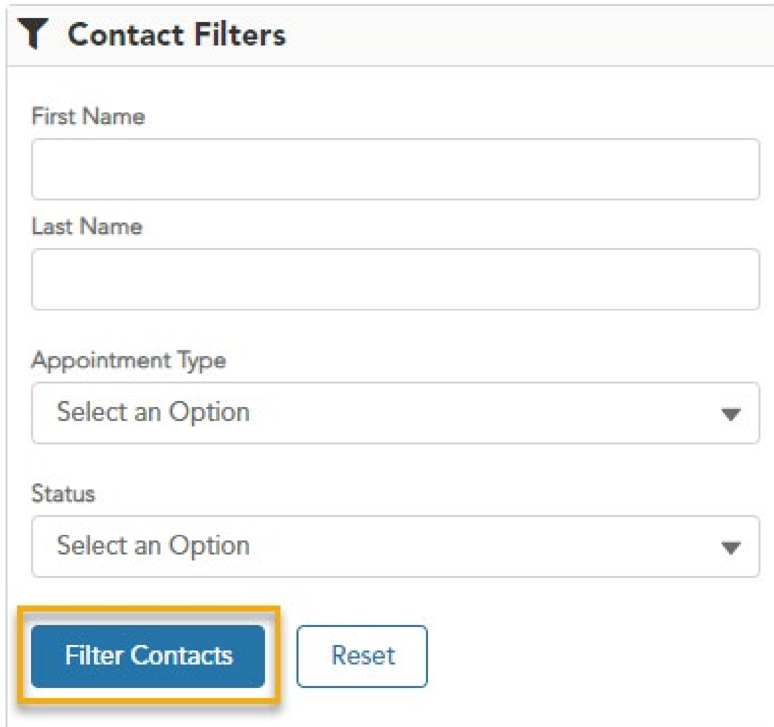
Step	Action
1	Select the appropriate *Contact Filters* using the fields and drop-down menus. 

Continued on next page

***Search* Tab**, Continued

Filtering Search Results, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Select Filter Contacts.



Result: The list of filtered results display in the staff records list.</td></tr>
</table>

Dashboard Tab

Overview

myAgency's *Dashboard* provides agency principals self-service downloadable data analytics and access to key metrics to help manage their agency's relationship with Citizens, including your current book of business.

The dashboard displays interactive charts and reports of policies-in-force, new-business submissions, performance violations and claims on their agency's book.

APs can explore and drill down on the metrics in the charts and reports using filters. Metrics, policy lists and filtered reports can be exported without affecting the underlying dataset or the original dashboards.

Navigate between available dashboards by selecting the corresponding tabs at the bottom of the screen:

Continued on next page

Dashboard Tab, Continued

Summary Tab

The *Summary* displays when the *Dashboard* tab is accessed and displays the number of:

1. Policies in force by form type
2. New business written in the last 12 months by form type
3. Claims filed within the last 36 months
4. Additional document request activities by month
5. Performance violations by month

To access, select **Dashboard:**

Continued on next page

Dashboard Tab, Continued

Book of Business Tab

The *Book of Business* tab provides metrics for the past 12 months and includes:

1. Policy count by form type
2. Policy count by effective date
3. Historical policy in force metrics by month
4. Policy details list

APs can export a copy of their current book of business using this tab. Refer to Viewing, Filtering and Exporting Dashboard Data for more information.

To access, select **Dashboard**, then the **Book of Business** tab:

Continued on next page

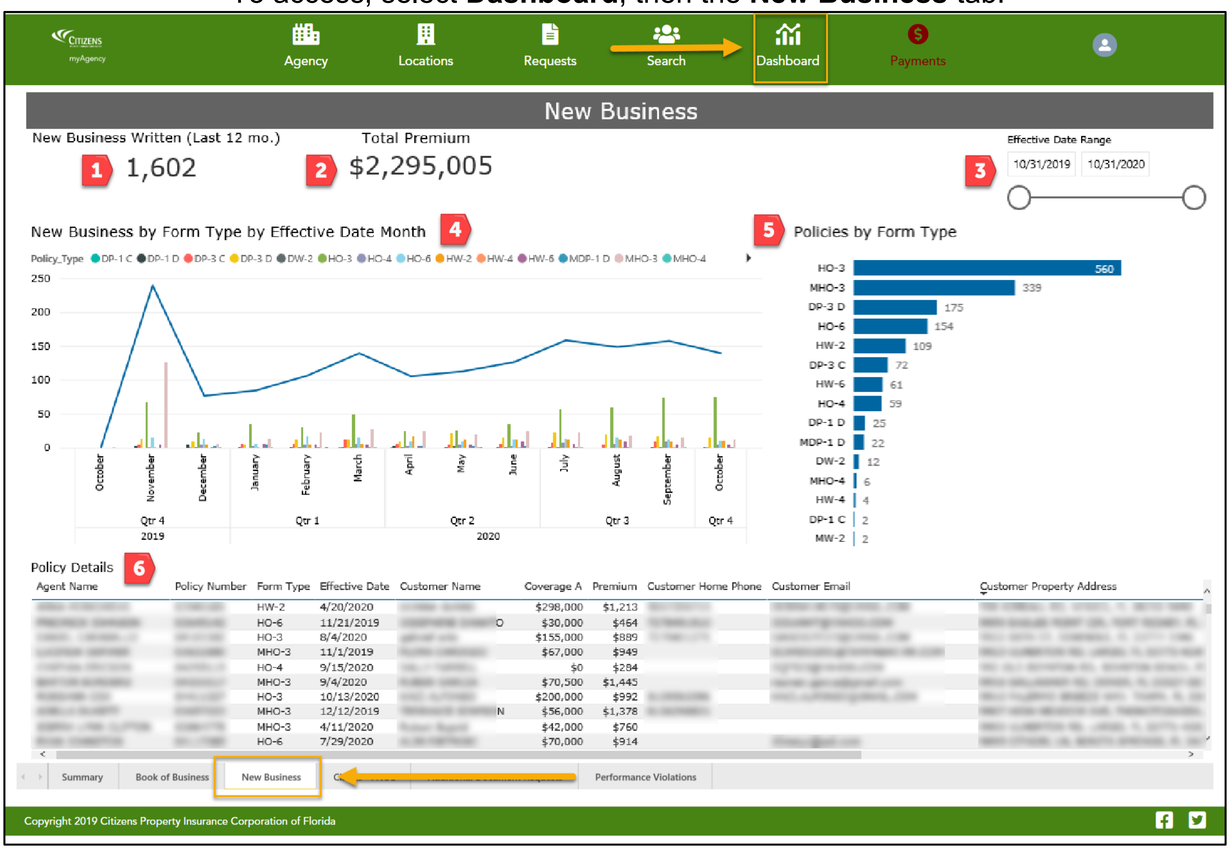
Dashboard Tab, Continued

New Business Tab

The *New Business* tab provides metrics for all business written in the past 12 months and includes:

1. Total new business within the last 12 months
2. Total premium
3. Effective date-range selector
   Note: Metrics will recalculate based on date range selected.
4. New business by form type by month
5. Policies by form type
6. Policy details list

To access, select **Dashboard**, then the **New Business** tab:



Continued on next page

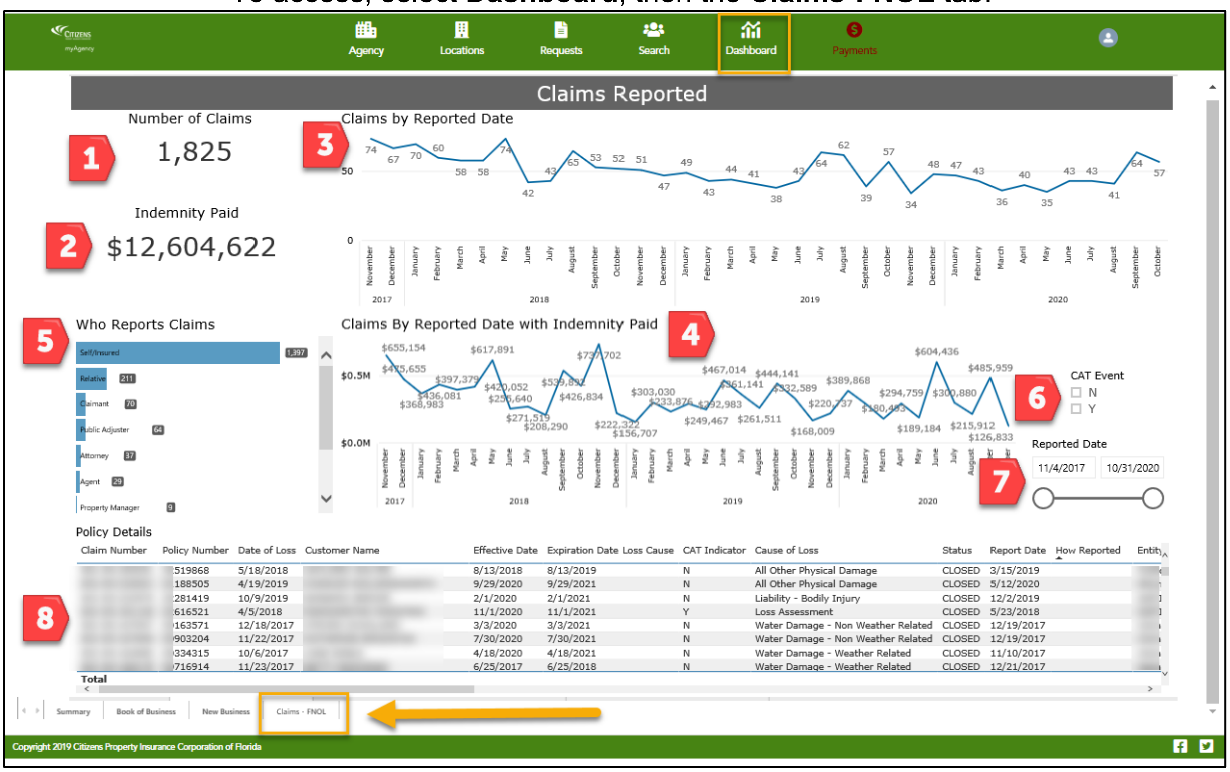
Dashboard Tab, Continued

Claims-FNOL Tab

The *Claims-FNOL* tab provides metrics for the last 36 months of claims filed on your book of business. The screen details:

1. Total number of claims
2. Indemnity paid
3. Claims reported by date
4. Claims reported by date with indemnity paid
5. Who reported the claim
6. CAT (catastrophe) event filter
7. Reported date filter
   Note: Metrics will recalculate based on date range selected.
8. Claim details

To access, select **Dashboard**, then the **Claims-FNOL** tab:



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***Dashboard* Tab**, Continued

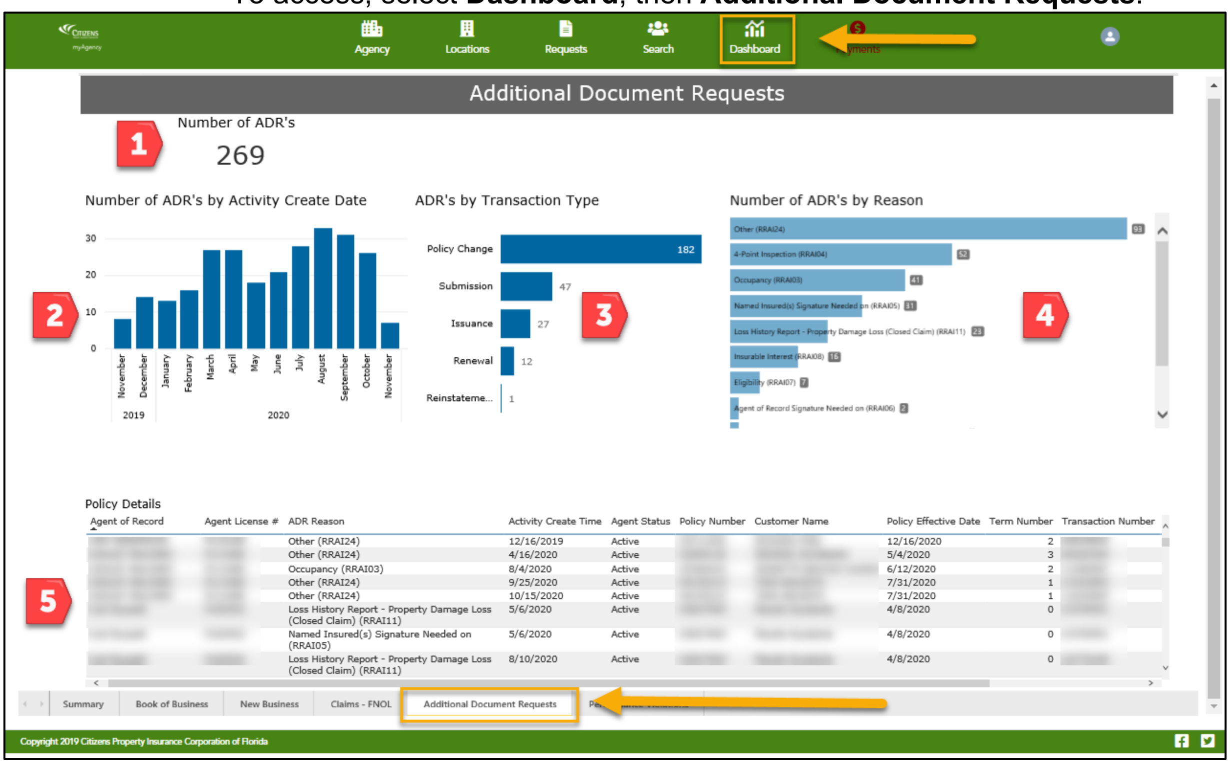
Additional Document Requests Tab

The *Additional Document Requests* tab displays metrics for the past 12 months of additional document requests (ADRs) sent to the agency. The *Additional Document Requests* screen displays:

1. The total number ADRs sent
2. Number of ADRs by date the activity was created
3. ADRs by transaction type
4. ADRs by reason
5. Detailed list of ADRs including agent of record, license number and ADR reason

Note: The total number of additional documents requested may be more than the number displayed in the Number of ADR's section (See 1 in the screenshot below). The *Policy Details List* includes a list of all documents requested.

To access, select **Dashboard**, then **Additional Document Requests**.



Continued on next page

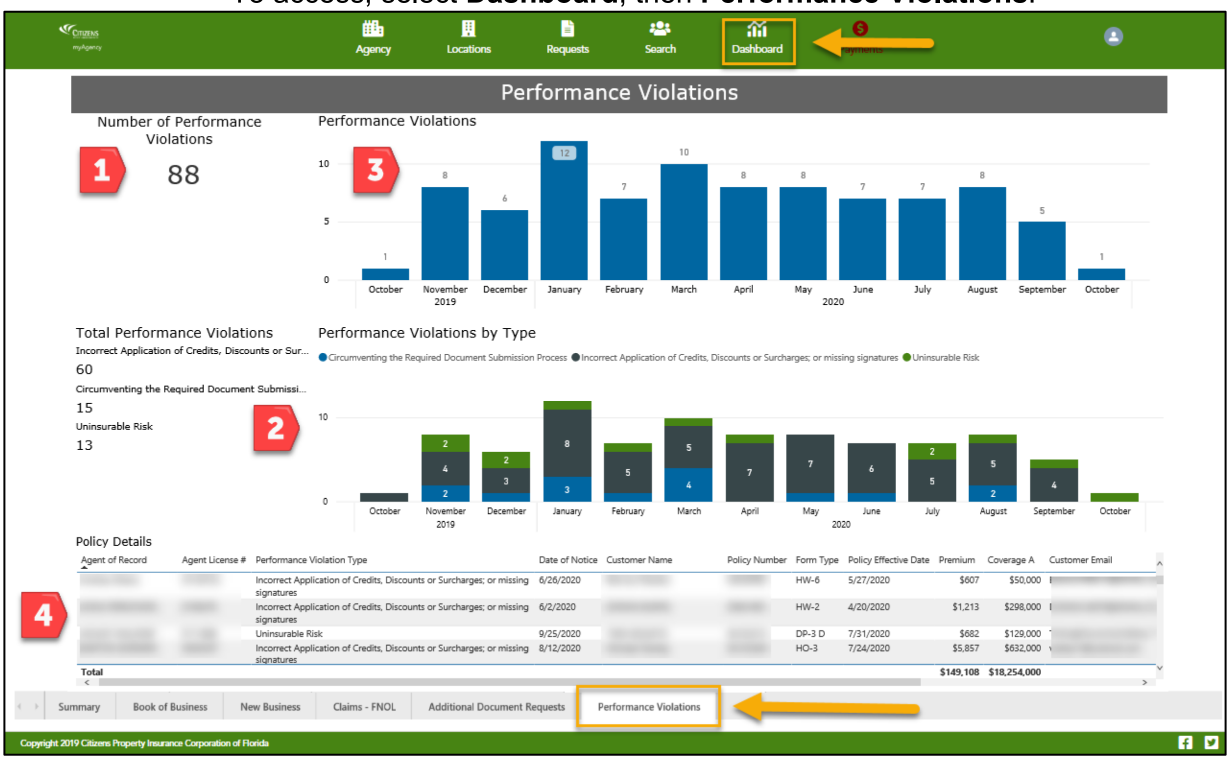
Dashboard **Tab**, Continued

***Performance Violations* Tab**

The *Performance Violations* tab displays metrics for the past 12 months of performance violations sent to the agency. The *Performance Violations* tab provides:

1. Number of performance violations
2. Total number of performance violations by type
3. Performance violations by month
4. Detailed list of performance violations including agent of record, license number and reason for violation

To access, select **Dashboard**, then **Performance Violations**:



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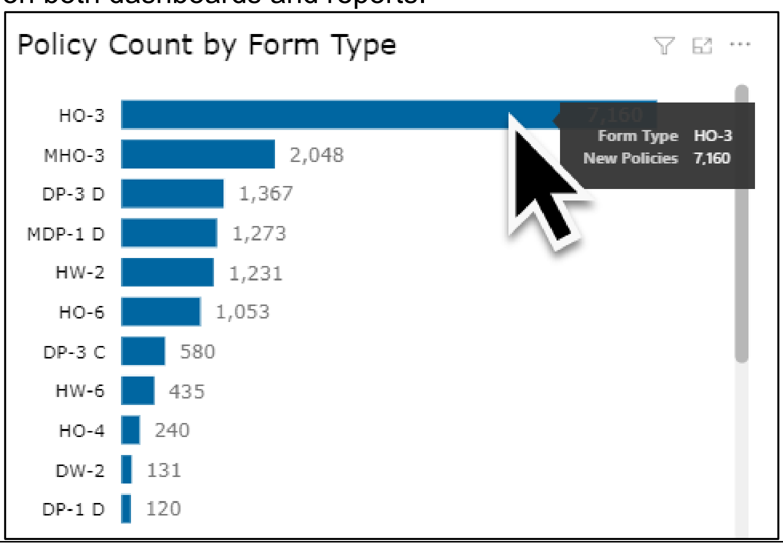
Dashboard Tab, Continued

Viewing, Filtering and Exporting Dashboard Data

Data Sources
The charts and graphs on the dashboards are generated from reports. Each report is based on one dataset, with one or more reports used to create the Dashboard.

Dashboard metrics cannot be edited, but there are several ways to use the data to monitor your agency and make data-supported decisions. Users can:

- View, sort and filter reports
- Export reports to Excel

To	Action
View Report Details View details about the data behind the chart on both dashboards and reports.	Hover over a tile to view details about the data behind the visual on both dashboards and reports. 

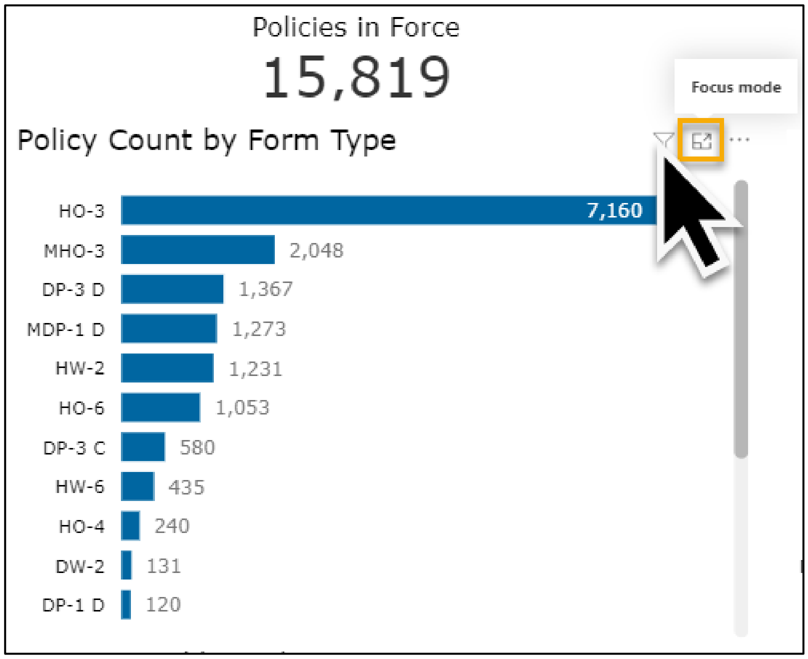
Continued on next page

***Dashboard* Tab**, Continued

Viewing, Filtering and Exporting Dashboard Data, continued

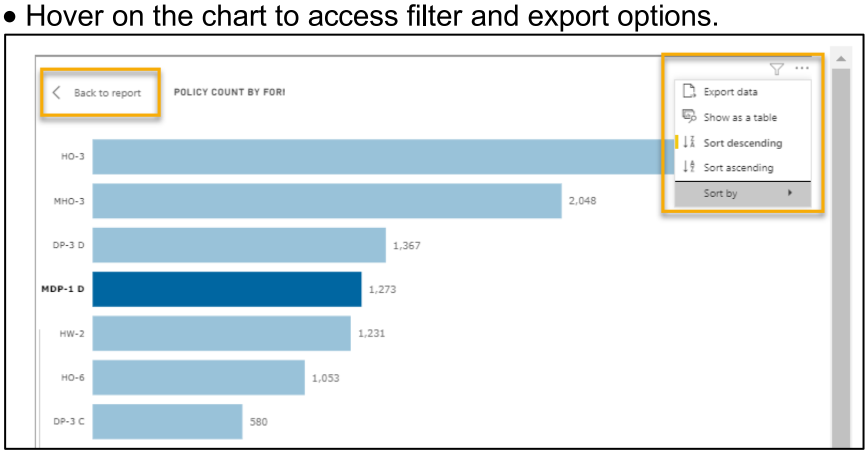
<table>
<tr><th>To</th><th>Action</th></tr>
<tr><td>View in Focus Mode
Use Focus Mode to expand a chart or graph.

Tip: You can use the Focus mode for a better view of the objects in the dashboard. Filters can be applied in Focus mode.</td><td>Hover on the tile until the option for Focus mode displays. Select Focus Mode.



Result: The selected chart or graph displays.

• To exit Focus mode, select Back to report.
• Hover on the chart to access filter and export options.

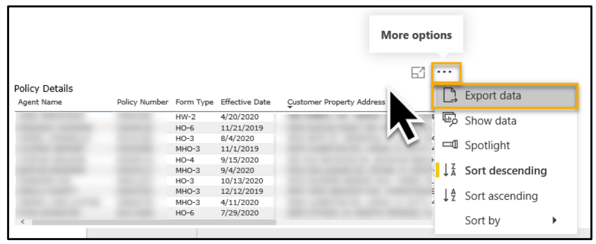
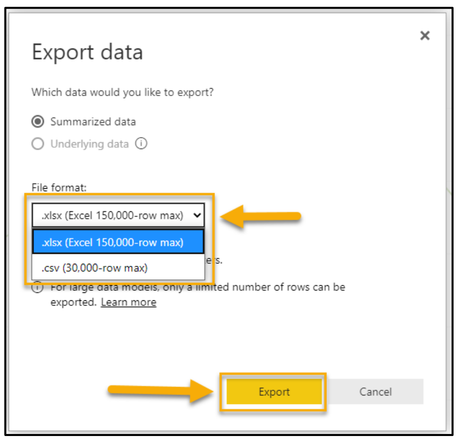
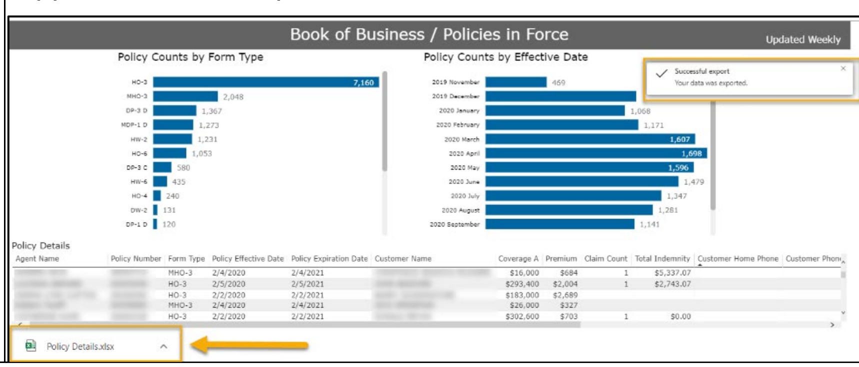


</td></tr>
</table>

Continued on next page

Dashboard Tab, Continued

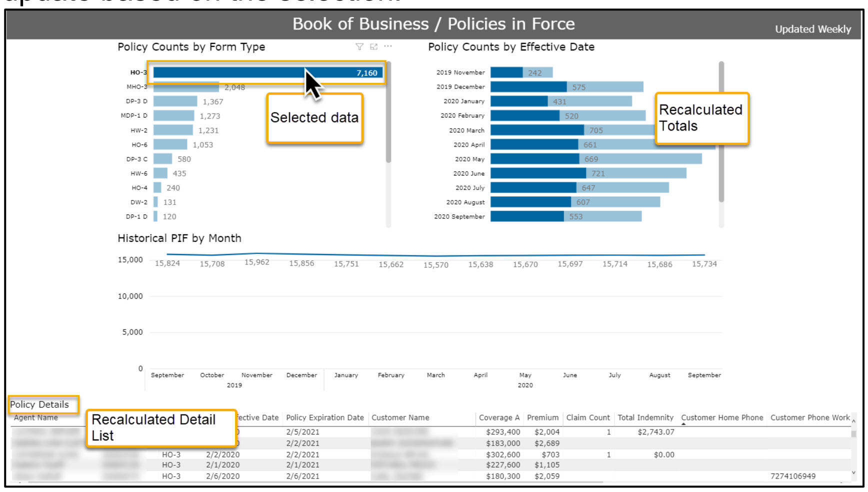
Viewing, Filtering and Exporting Dashboard Data, continued

To	Action
Export Data to Excel Exporting data to Excel will allow APs and APDs to print and share data. *Tip:* An agency's book of business can be easily accessed and exported using this feature. Exported files can be printed.	Hover in the chart, graph or list until *More Options* displays, then select **Export Data:**  **Result:** The *Export Data* window appears:  Select the format needed from the **File format** drop-down menu, then **Export.** **Result**: A successful export message will appear. The report will appear in the workspace below: 

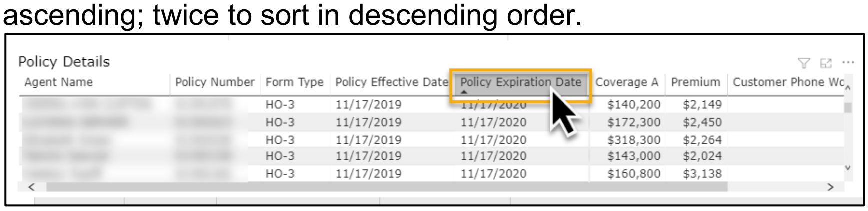
Continued on next page

Dashboard Tab, Continued

Viewing, Filtering and Exporting Dashboard Data, continued

<table>
<tr><th>To</th><th>Action</th></tr>
<tr><td>Drill Down Data in a Chart or Graph
The total number for each data set will display by default.</td><td>To drill down by month or, if applicable, form type, select the data set on the chart. The total for the selected data set will display the recalculated value. Any associated detail lists and/or charts will update based on the selection.


Click within the tile again to clear drill-down settings.</td></tr>
<tr><td>Filter Data in a List
Create a custom report using list filters.

Tip: Use this feature when remarketing your book of business. This can be useful when determining what policies are coming up for renewal or when a market opens for a specific policy type.</td><td>Policy Details lists can be filtered in ascending or descending order by column. To sort, click on the column once to sort ascending; twice to sort in descending order.


Result: The list will re-sort based on your selection.</td></tr>
</table>

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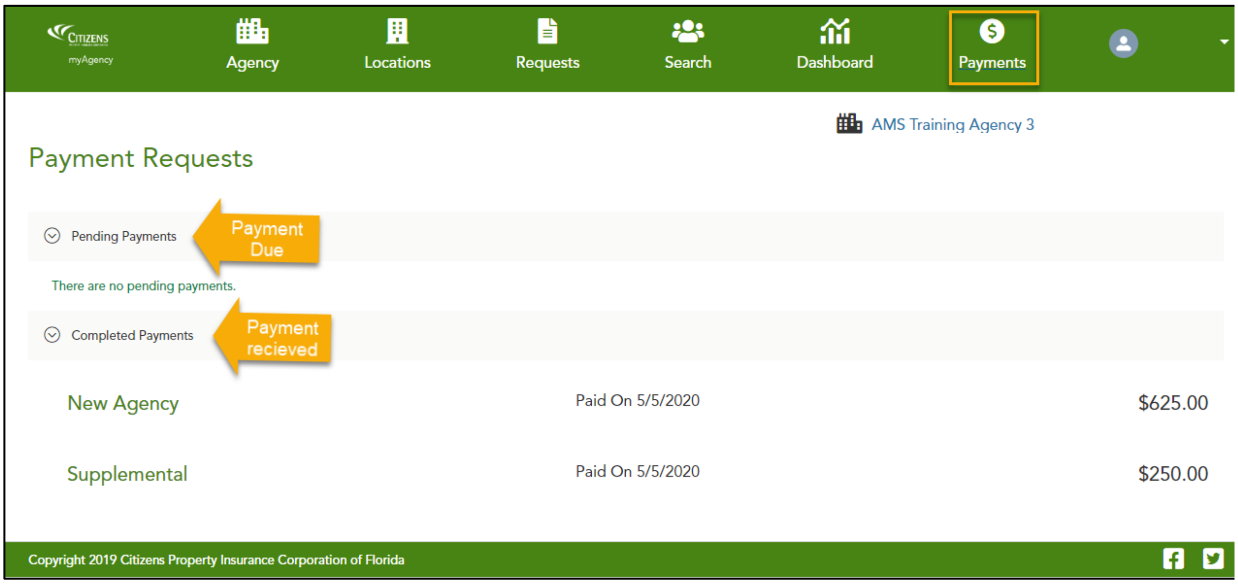
Payments Tab

Overview

From the *Payments tab*, APs can view fees and payments, including:

- *Pending Payments* to make a payment
- *Completed Payments* to view recent payments
- *Expired payments* to view past due payments



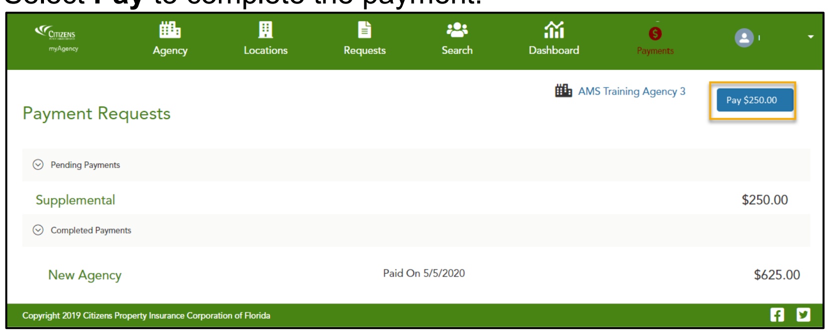
Continued on next page

Payments Tab, Continued

Making a Payment

When a balance is due, the *Payments* icon turns red:

To make a payment:

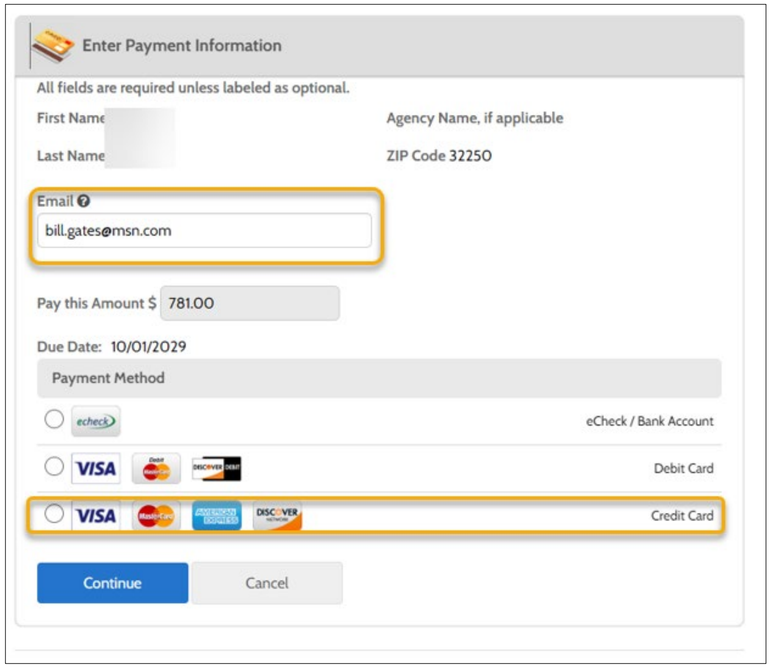
Step	Action
1	Select the **Payments** tab.  *Note:* A payment can only be made on a pending balance due when all required education is complete. **Result:** The *Payments* tab displays.
2	The balance due displays in the *Pending Payments* section. Select **Pay** to complete the payment.  *Note:* A payment cannot be made if training is not complete. **Result:** The *One-Time Payment* screen will display.

Continued on next page

***Payments* Tab**, Continued

Making a Payment, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Enter the email address you will need the payment receipt issued to and select the desired payment method. Ex. ‘Credit Card’, then select Continue:

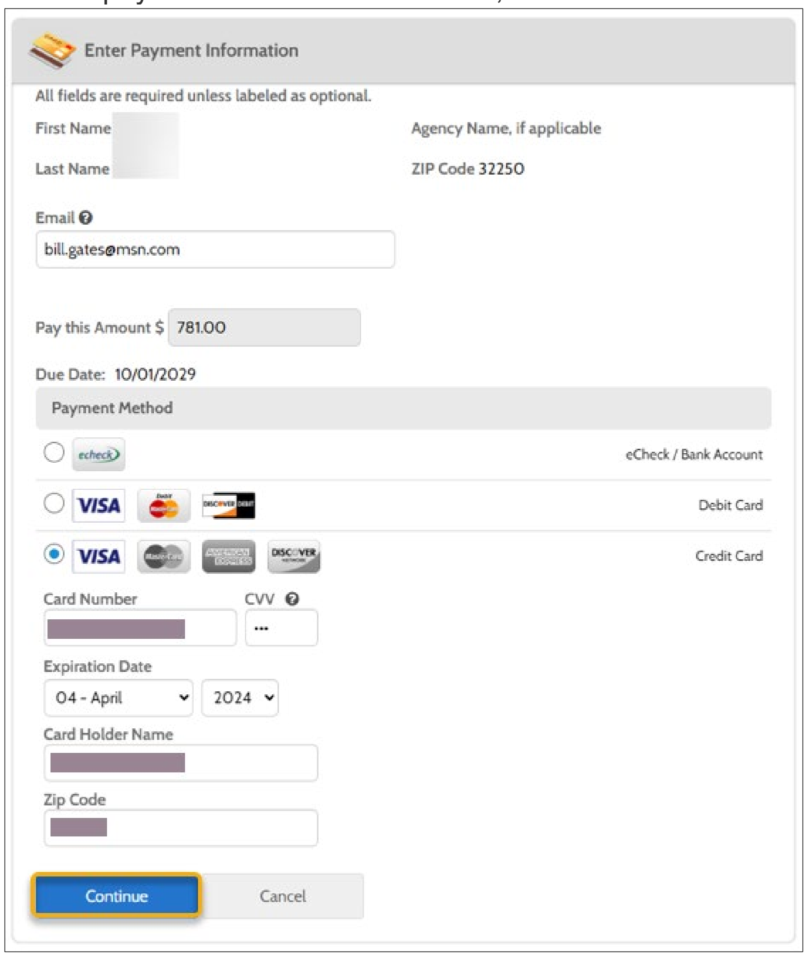


Result: The One-Time Payment screen appears.</td></tr>
</table>

Continued on next page

Payments Tab, Continued

Making a Payment, continued

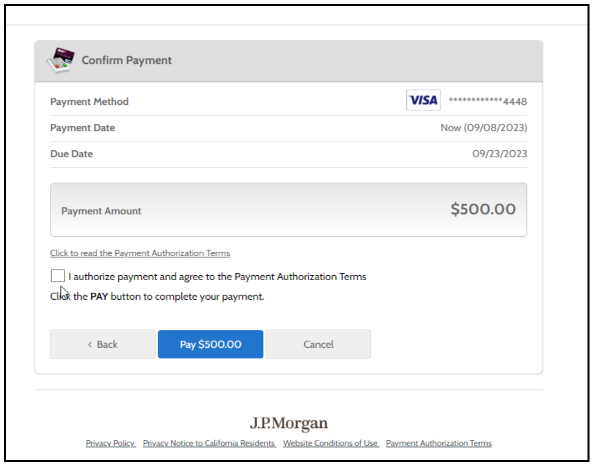
Step	Action
4	Ensure payment information is correct, then select **Continue**:  **Result:** The *Confirm Payment* screen will appear.

Continued on next page

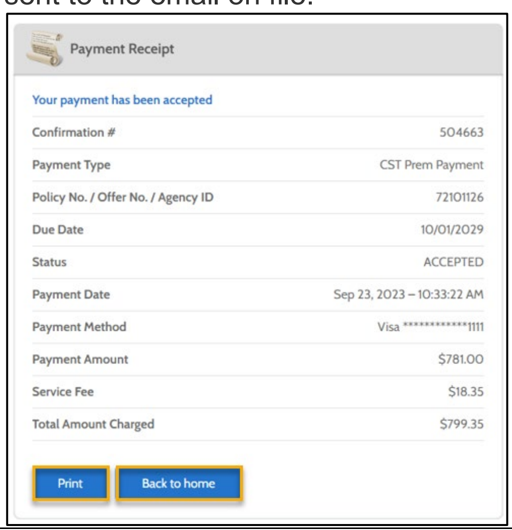
Payments Tab, Continued

Making a Payment, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The payment amount will display. elect the Authorize box before proceeding to the blue ‘Pay $0.00’ button at the bottom of the screen.



Note: You must agree to the terms and conditions prior to proceeding.</td></tr>
<tr><td>6</td><td>The Payment Receipt will generate if processed successfully. Options will appear at the bottom of the confirmation to either Print of return Back to Home. Payment confirmation will be sent to the email on file.


</td></tr>
</table>

Continued on next page

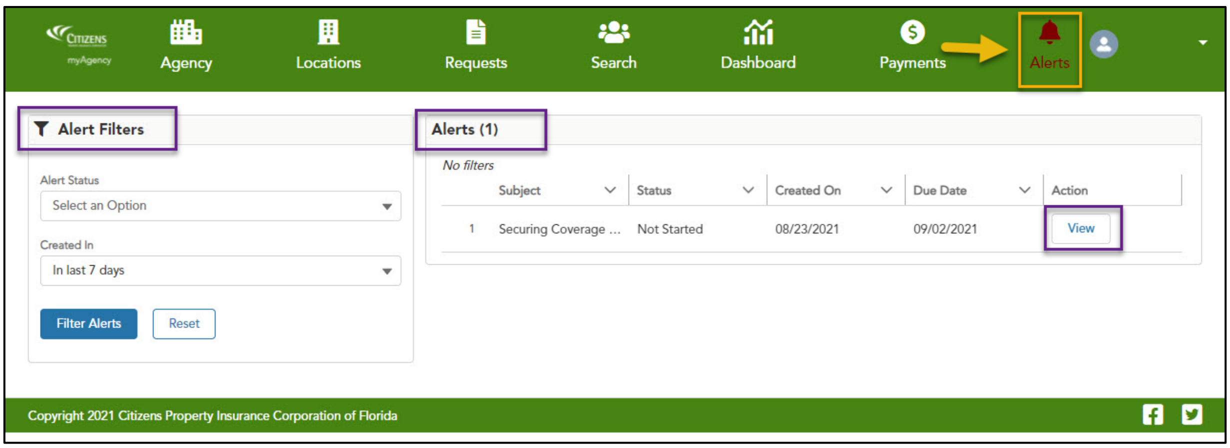
Alerts Tab

Overview

From the *Alerts* tab, APs will access important policy and/or claim information that should be viewed or acknowledged by the agency principal.

APs can:

- Access communications and announcements
- Download policy files
- Access resources and useful links

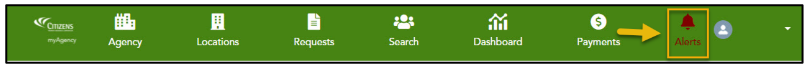
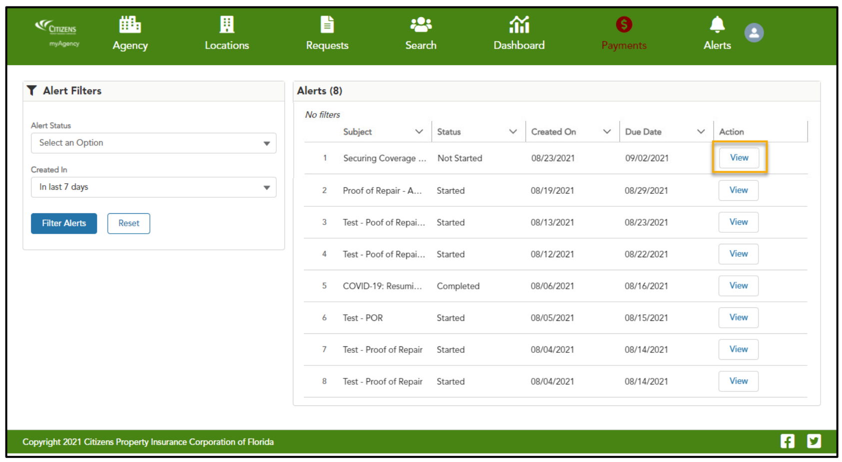
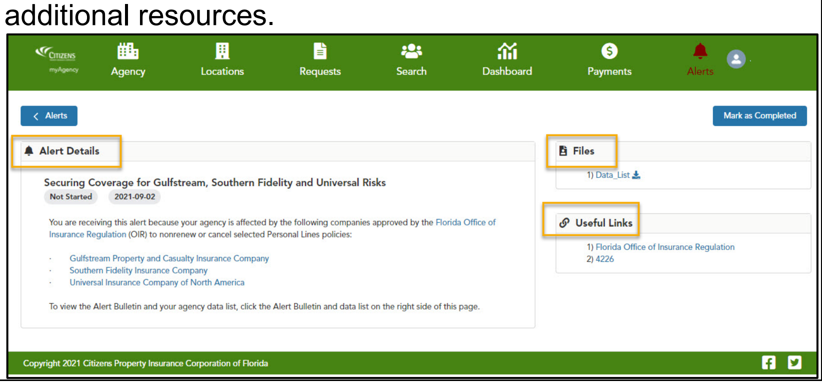


Continued on next page

Alerts Tab, Continued

Accessing Alerts

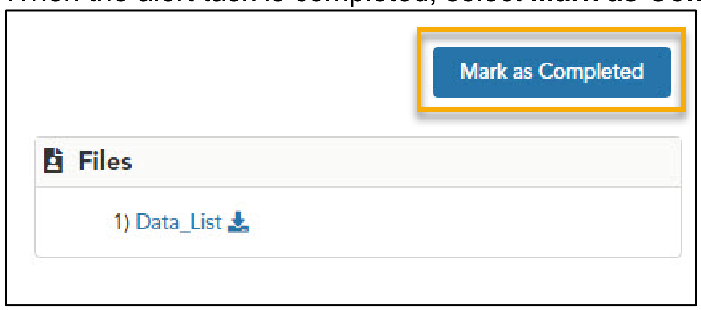
When new alerts and policy files are sent, the *Alerts* tab will display red. To access the alert:

Step	Action
1	Select the **Alerts** tab.  **Result:** The *Alerts* tab will display a list of recent communications and their status: • *Not Started* • *Started* • *Completed* *Note:* Tasks that have not been completed will display first.
2	Select **View** from the *Actions* column.  **Result:** The communication displays.
3	The alert task will include the following: • *Alert Details* to clarify what action is needed • Files will include the policy files pertaining to the Alert Details • *Useful Links* will include links to job aids, guides and additional resources. 

Continued on next page

Alerts Tab, Continued

Accessing Alerts, continued

Step	Action
4	To download policy file, select the data list link.  **Result:** The data file will open as a .csv file.
5	When the alert task is completed, select **Mark as Completed.**  **Result:** The Alert will indicate *Completed.*
6	Select **Alerts** to return to the list. 

Appendix 1: Assigning Staff Appointment Types

Staff Appointment Type Options

While processing renewals or adding new staff, AP's can select or update staff appointment types based on their role at the agency. Refer to the chart below to determine which role best fits the needs of your agency.

Note: Appointment fees and new agent education requirements do not apply to LCR's or support staff; however, Citizens reserves the right to assign mandatory education to all credentialled users.

If you need the staff member to	At a	Indicate *YES* to the following questions:	For a
Be agent of record on their own book of business	Single or multiple locations, based on agency access	*Can the staff member write new business?* Will staff member be an Agent of Record on policies written by your agency? Then indicate *Lines of Authority*	**Fully appointed agent**
Write new business and services under a fully appointed agent	Single location	*Can the staff member write new business?*	**Limited agent**
Write new business and services under a fully appointed agent	Single location	*Can the staff member write new business?*	**Licensed Customer Representative (LCR) Write and Service**
Service only existing business. **New business prohibited**	All locations	**Make no selection**. Continue to the next step.	**Service-Only Licensed Customer Representative (LCR)**
Only view existing business and policy status	All locations	*Is Support Staff?*	**View-Only Support Staff**

Appendix 2: Agent Appointment Education Requirements

Overview

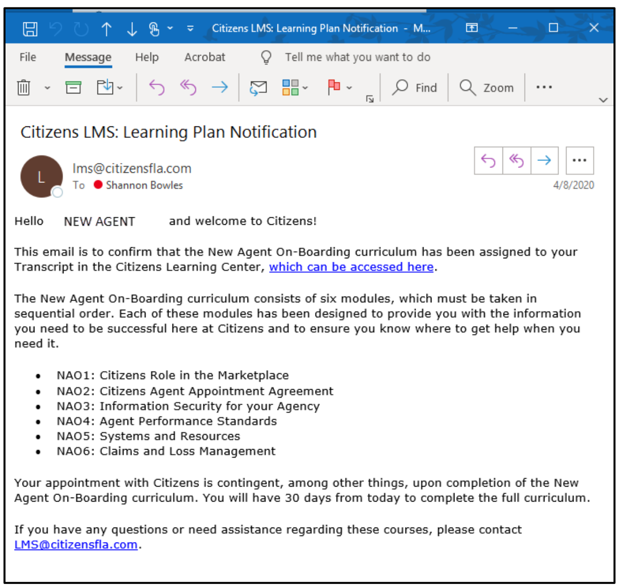
Agents must successfully complete Citizens' training modules prior to completing their appointment process.

In addition, appointed agents must complete other training and certification requirements as Citizens deems necessary.

Note: If an agent was previously appointed with Citizens or changing agencies, training is not required, but it is encouraged and will be available in Citizens Learning Center (CLC).

Assigned Education

Agents seeking appointment will receive an email from Citizens indicating the following online modules must be completed:



Citizens LMS: Learning Plan Notification

lms@citizensfla.com
To Shannon Bowles
4/8/2020

Hello NEW AGENT and welcome to Citizens!

This email is to confirm that the New Agent On-Boarding curriculum has been assigned to your Transcript in the Citizens Learning Center, which can be accessed here.

The New Agent On-Boarding curriculum consists of six modules, which must be taken in sequential order. Each of these modules has been designed to provide you with the information you need to be successful here at Citizens and to ensure you know where to get help when you need it.

- NAO1: Citizens Role in the Marketplace
- NAO2: Citizens Agent Appointment Agreement
- NAO3: Information Security for your Agency
- NAO4: Agent Performance Standards
- NAO5: Systems and Resources
- NAO6: Claims and Loss Management

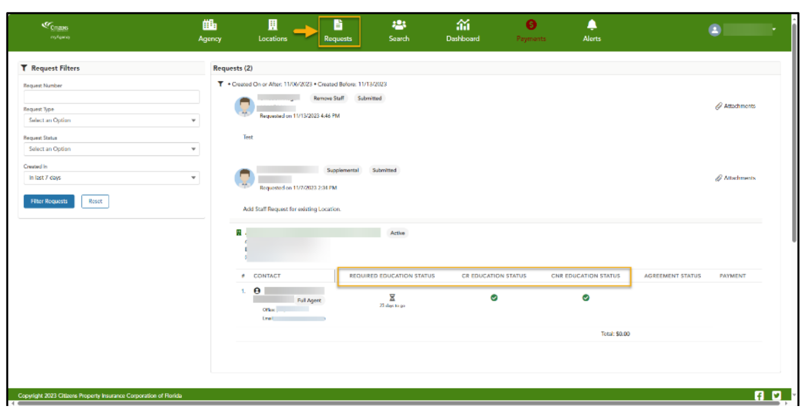
Your appointment with Citizens is contingent, among other things, upon completion of the New Agent On-Boarding curriculum. You will have 30 days from today to complete the full curriculum.

If you have any questions or need assistance regarding these courses, please contact LMS@citizensfla.com.

- NAO1: *Citizens' Role in the Marketplace*
- NAO2: *Citizens Agent Appointment Agreement*
- NAO3: *Information Security for your Agency*
- NAO4: *Agent Performance Standards*
- NAO5: *Systems and Resources*
- NAO6: *Claims and Loss Management*

The modules must be completed within **30 days** of assignment. Reminders will be emailed ten and 2 days prior to the deadline.

The agent's progress will display as **Education Status** on the *Requests* tab in myAgency.



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Appendix 2: Agent Appointment Education Requirements, Continued

Assigned, Mandatory, Voluntary and On-Demand Education

Assigned Education
Citizens reserves the right to assign additional mandatory training as needed.

Mandatory Training
Any user that has not completed the training will not be able to obtain and/or renew their appointment with Citizens.

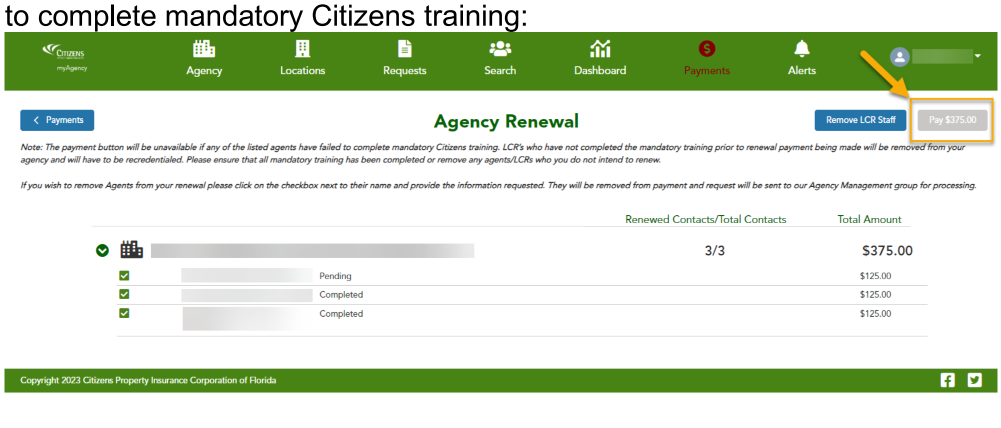
Voluntary Live, Online, Webinars and Virtual Courses
Citizens offers classroom and online training to educate our agents about our products and services. All agency staff are encouraged to access Citizens Learning Center (CLC) to explore our library of online modules and recorded webinars.

Job Aids and Guides
Citizens has created multiple resources to assist with all aspects of writing and servicing business. To access job aids and guides, login to the Citizens *Agents* website, then select **Training.** Select **Personal** or **Commercial** to view the full library of resources.

Mandatory Training: Renewal Education Requirements

Appointed Agents
If there are appointed agents in an agency that have not completed mandatory training, this will prevent the agency from renewing with Citizens.

The payment button will be unavailable if any of the listed agents have failed to complete mandatory Citizens training:



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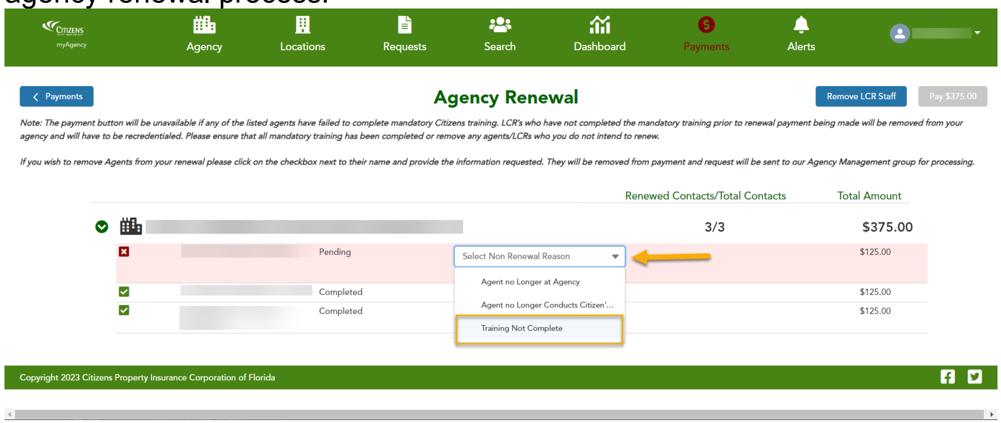
Appendix 2: Agent Appointment Education Requirements, Continued

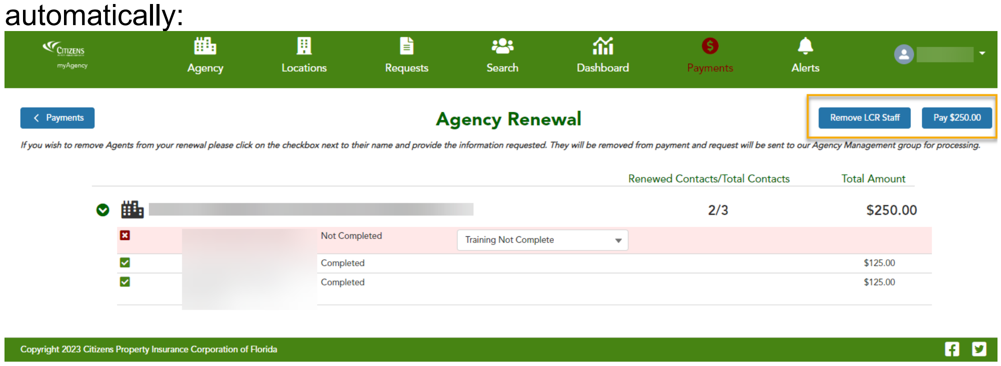
Mandatory Training: Renewal Education Requirements, continued

APs can choose to either nonrenew the appointed agent or allow the appointed agent to complete the mandatory education prior to continuing the agency renewal process:



Licensed Customer Representatives
LCRs who have not completed the mandatory training prior to renewal payment being made will be removed from your agency and will have to be recredentialed.

APs can either select **Remove LCR Staff** to manually remove LCRs who have not completed mandatory training or **Pay** to remove them automatically:



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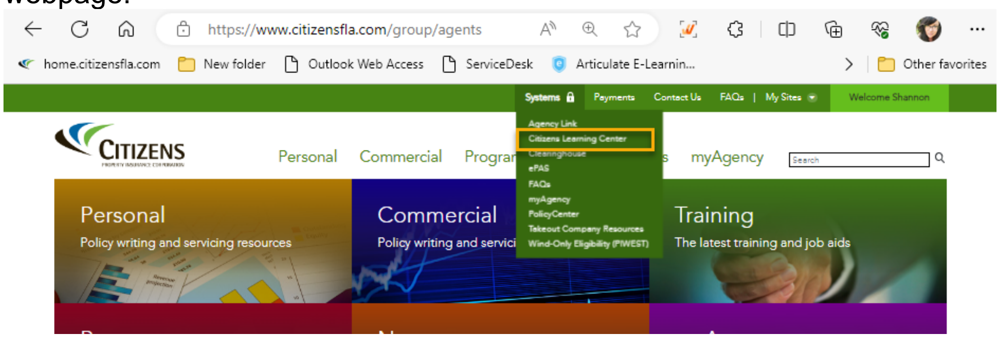
Appendix 2: Agent Appointment Education Requirements, Continued

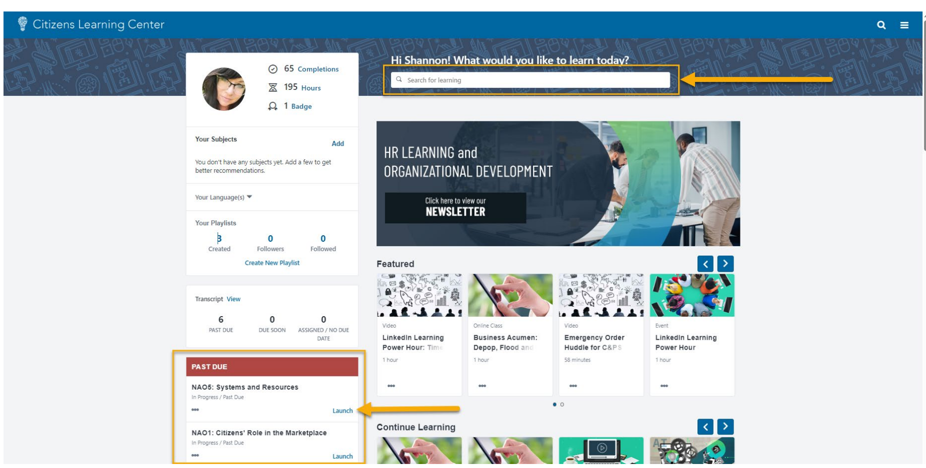
Mandatory Training: Renewal Education Requirements, continued

Avoiding Blocked Renewals or Revoked Credentials
To avoid adverse action, credentialed users will need to complete the mandatory training or be removed from the agency's staff appointment **prior to the agency's renewal date.**

Users can access mandatory education from the *Agents* site by selecting **Citizens Learning Center** from the *Systems* menu at the top of the webpage:



Enter the name of the mandatory education in the search box at the top of the CLC homepage, or, if the training has already been assigned, select **Launch** from the *Past Due* list:



Once the training has been completed, the renewal function to be updated in myAgency.