



Agency



Locations



Requests



Search



Dashboard



Payments



User Guide for Agency Principals and their Designees



Table of Contents Quickly navigate to any section by clicking on the topic in the table:

Welcome to myAgency	3
What Is myAgency?	3
Who Can Access myAgency?	3
What are the Benefits?	3
Browser Requirements and Access	4
Browser Requirements	4
Username and Passwords.....	4
Accessing myAgency.....	7
Basic Navigation	10
Layout: Tabs and Tiles	10
Submitting Requests.....	11
Site Map.....	14
<i>Agency Tab</i>	16
Function Overview	16
<i>Agency Principal</i> Tile	17
Request: Change Agency Principal.....	18
Request: Change Agency Principal Designee.....	21
Request: Agency Principal Info Change Request	24
<i>Citizens Contact Information</i> Tile.....	26
<i>Agency Information</i> Tile	27
Request: Agency Information Update.....	28
Request: E&O Information Update	31
Request: Name, DBA, TIN Information Update	35
Request: Buy, Sell, Transfer.....	39
Request: Agency Commission Inquiry.....	46
Request: Electronic Payment Information Update.....	49
Request: Password Reset	51
Request: General Inquiry.....	53
Appointment Renewals	55
Appointment Renewal Overview	55
Processing Appointment Renewals.....	55
<i>Locations Tab</i>	60
Functions Overview	60
Supplemental Application: Add Location	61
Supplemental Application: Add Staff Overview	65
Add Staff: Fully Appointed Agent.....	67

Add Staff: Limited Agent	72
Add Staff: LCR Write and Service	77
Add Staff: Service-Only LCR	80
Add Staff: View-Only Support	84
Request: Edit Agency Location Information	87
Request: Staff Information Change	89
Request: Transfer Staff to a New Location	92
Request: Update Line of Authority	95
Request: Remove Staff	99
<i>Requests Tab</i>	103
Overview	103
Filtering Requests	104
<i>Search Tab</i>	106
Overview	106
Filtering Search Results	107
<i>Dashboard Tab</i>	109
Overview	109
<i>Summary Tab</i>	110
<i>Book of Business Tab</i>	111
<i>New Business Tab</i>	112
<i>Claims-FNOL Tab</i>	113
<i>Additional Document Requests Tab</i>	114
<i>Performance Violations Tab</i>	115
Viewing, Filtering and Exporting Dashboard Data	116
<i>Payments Tab</i>	120
Overview	120
Making a Payment	121
<i>Alerts Tab</i>	125
Overview	125
Accessing Alerts	126
Appendix 1: Assigning Staff Appointment Types	128
Staff Appointment Type Options	128
Appendix 2: Agent Appointment Education Requirements	129
Overview	129
Assigned Education	129
Assigned, Mandatory, Voluntary and On-Demand Education	130
Mandatory Training: Renewal Education Requirements	130



Agency



Locations



Requests



Search



Dashboard



Payments

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.

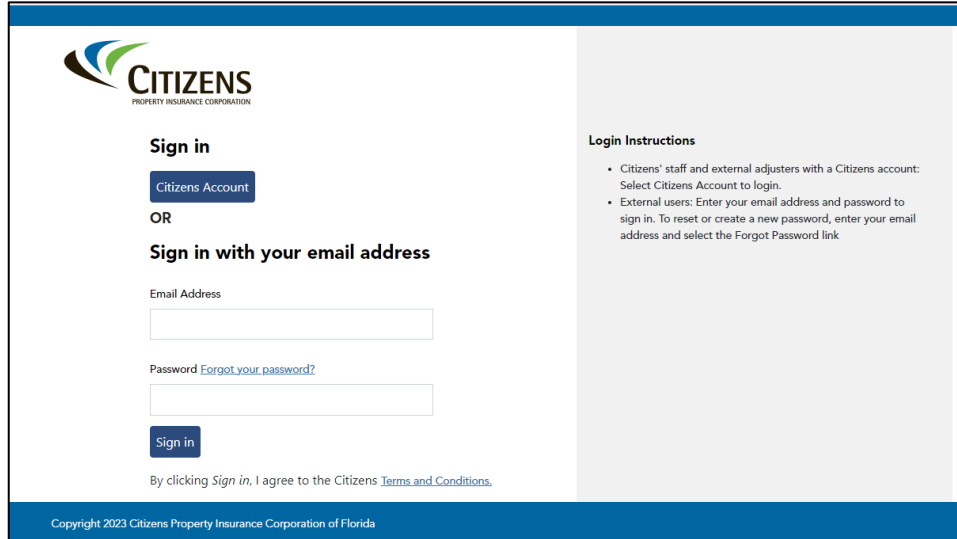
Browser Requirements and Access

Browser Requirements

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

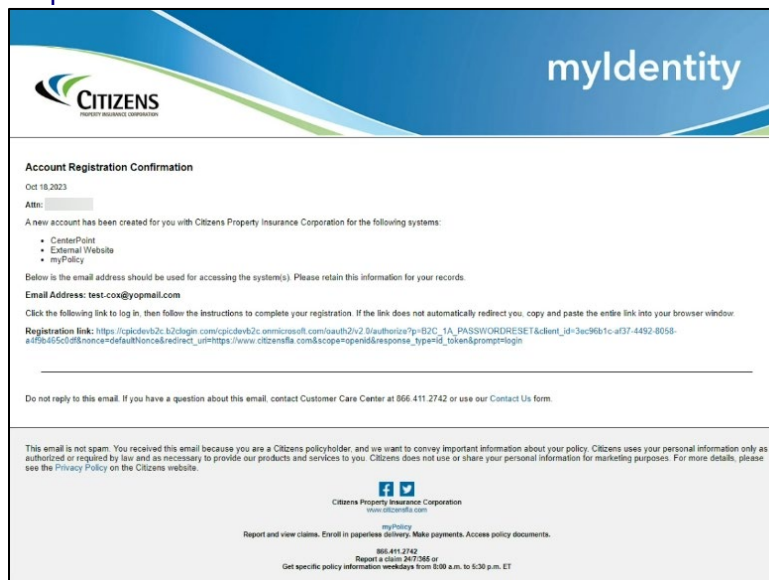
Username and Passwords

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.


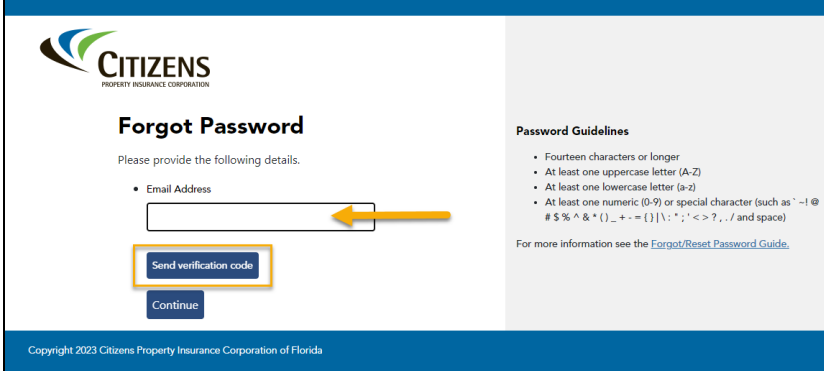


Continued on next page

Browser Requirements and Access, Continued

Username and Passwords, continued

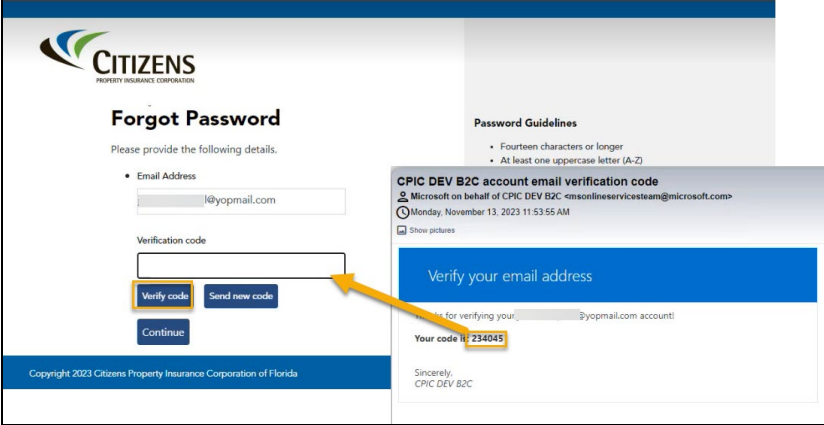
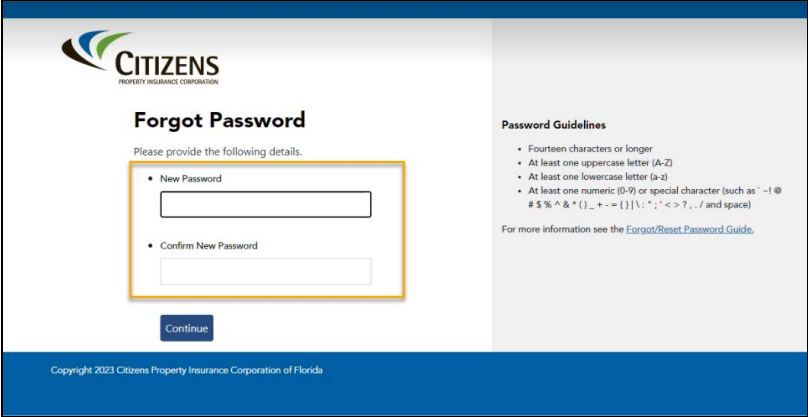
The process for establishing and/or resetting your password are similar.

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

Continued on next page

Browser Requirements and Access, Continued

Username and Passwords, continued

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

Continued on next page

Browser Requirements and Access, Continued

Accessing myAgency

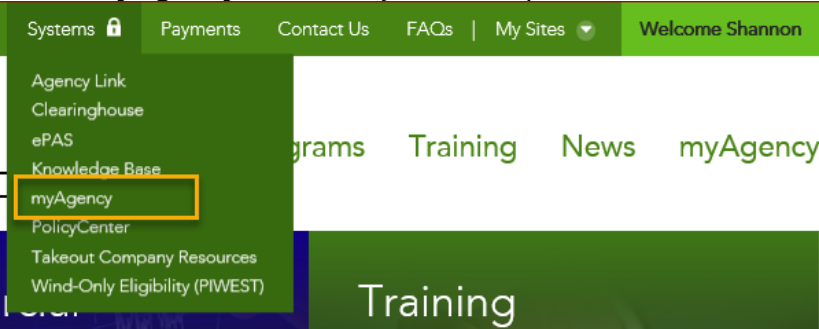
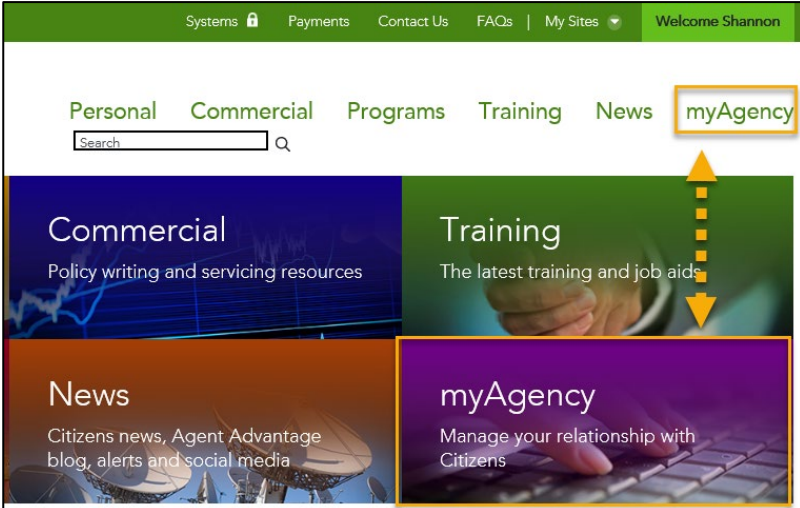
To access myAgency:

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

Continued on next page

Browser Requirements and Access, Continued


Accessing myAgency, continued

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

Continued on next page

Browser Requirements and Access, Continued

Accessing myAgency, continued

Step	Action
4	<p>myAgency will temporarily require an additional step to login.</p> <p>Use your email address and newly established myAgency-only password to access myAgency, then select Sign In.</p>  <div data-bbox="581 1323 1112 1543" style="border: 1px solid gray; padding: 5px;"> <p>Login Instructions</p> <ul style="list-style-type: none"> • 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 </div> <div data-bbox="1128 1323 1396 1543" style="border: 1px solid gray; padding: 5px;"> <p>Important note: Do not select <i>Citizens Account</i>. This is for Citizens staff only. Result: myAgency will display.</p> </div>

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.

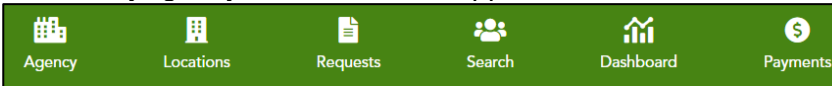
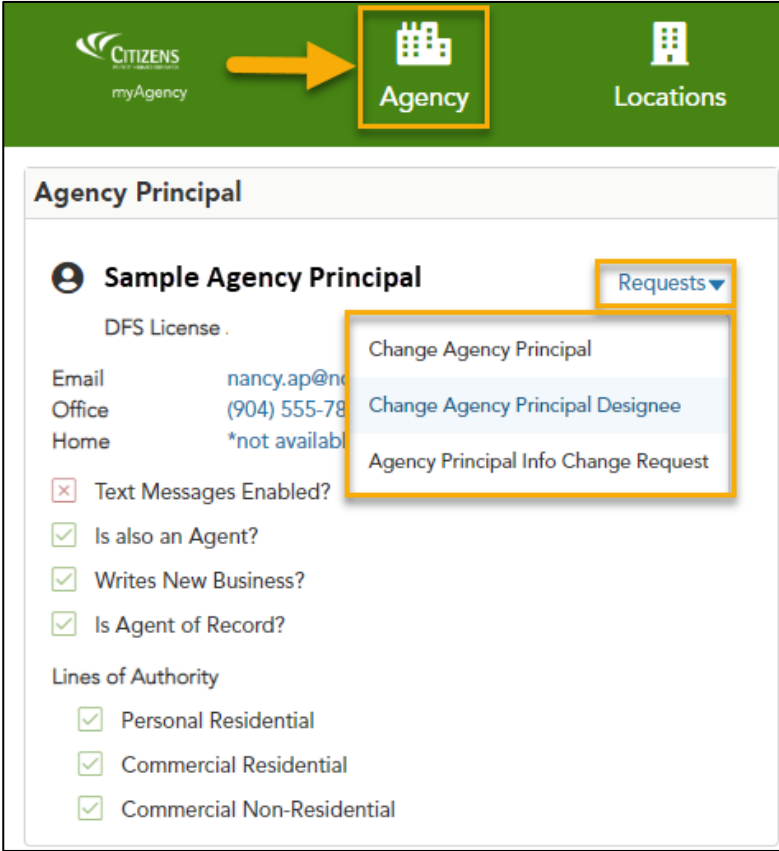
Basic Navigation, Continued

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.

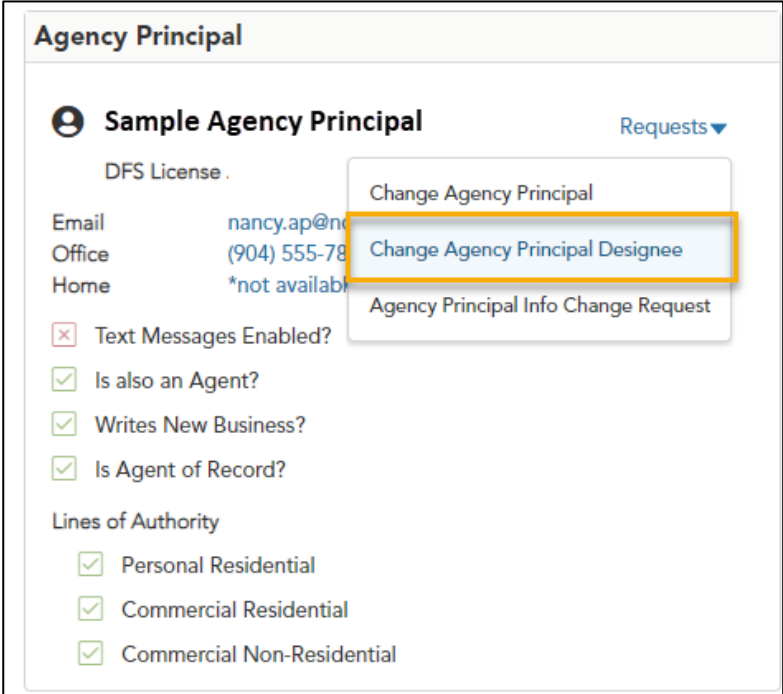
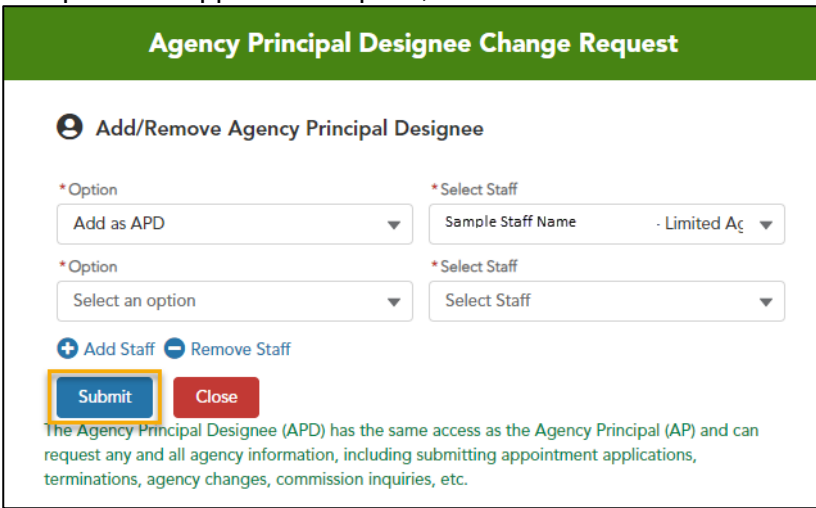
To submit any request:

Step	Action
1	Access myAgency, then select the applicable tab. 
2	Most tiles display a <i>Requests</i> drop-down menu to access related requests. Select the Requests drop-down menu. 

Continued on next page

Basic Navigation, Continued

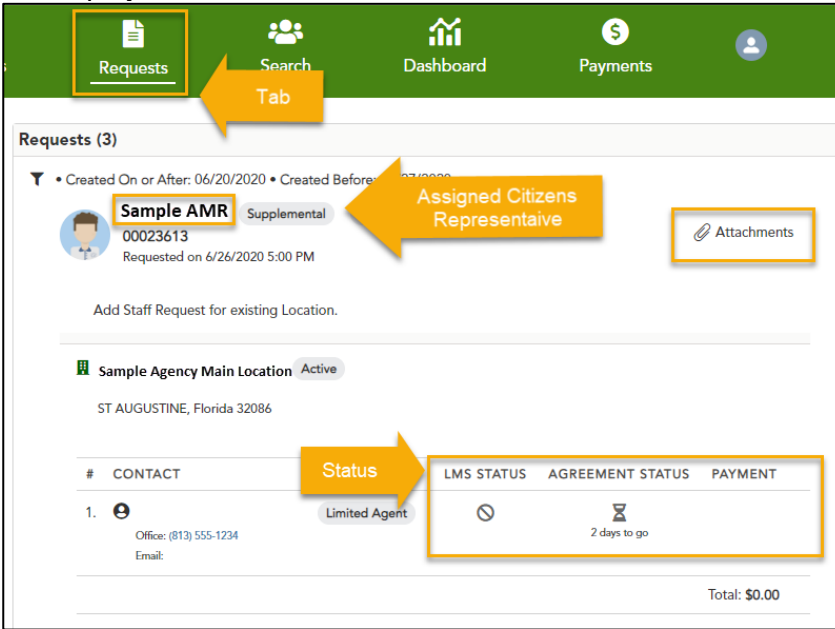
Submitting Requests, continued

Step	Action
3	<p>From <i>Requests</i>, select the applicable request.</p>  <p>Result: The applicable request screen will display.</p>
4	<p>Complete the applicable request, then select Submit.</p>  <p>Result: A confirmation banner will appear after any request is successfully submitted.</p>

Continued on next page

Basic Navigation, Continued

Submitting Requests, continued

Step	Action
5	<p>To confirm the status of any submitted change, select the Requests tab. The request, any uploaded files and the assigned Citizens' contact will display.</p> <p><i>Note:</i> If the request is auto approved, the AP's or APD's name will display.</p>  <p>The screenshot shows the 'Requests' tab selected in the top navigation bar. Below the navigation bar, the 'Requests (3)' section is visible. A request titled 'Sample AMR' is displayed, with a 'Supplemental' status and an 'Assigned Citizens Representative' label. The request details include '00023613' and 'Requested on 6/26/2020 5:00 PM'. Below the request details, there is a section for 'Sample Agency Main Location' with the address 'ST AUGUSTINE, Florida 32086'. At the bottom, a table shows the status of the request, with columns for 'CONTACT', 'LMS STATUS', 'AGREEMENT STATUS', and 'PAYMENT'. The 'LMS STATUS' and 'AGREEMENT STATUS' columns are highlighted with a yellow box and labeled 'Status'.</p>

Continued on next page

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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • View Locations • Add Location
		Staff	<ul style="list-style-type: none"> • Add Staff
		Staff Member Details	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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
<i>Dashboard</i>	Access and/or export agency data about policies in force, new-business submissions, claims, and performance	Policies in Force (book of business)	<ul style="list-style-type: none"> Agency's total policy count Count by policy form type
		New Business Written in the last 12 months	<ul style="list-style-type: none"> Agency's total new-business policies Count by policy form type Count by month
		Claims Filed within the last 36 months	<ul style="list-style-type: none"> Agency's total claim count Count by month Count by policy form
		Additional Document Requests	Number of requests for additional documents by: <ul style="list-style-type: none"> Activity date Transaction type Reason
		Performance Violations	<ul style="list-style-type: none"> 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
<i>Payments</i>	View fees and payments	Pending Payments	<ul style="list-style-type: none"> Make payment
		Completed Payments	<ul style="list-style-type: none"> View recent payment amounts
		Expired Payments	<ul style="list-style-type: none"> View past payment amounts
<i>Alerts</i>	Access action-required policy lists	Alert filters	<ul style="list-style-type: none"> Filter alerts by date or status
		Alerts	<ul style="list-style-type: none"> Access important policy and/or claim information Download alert files Resources and useful links

Continued on next page

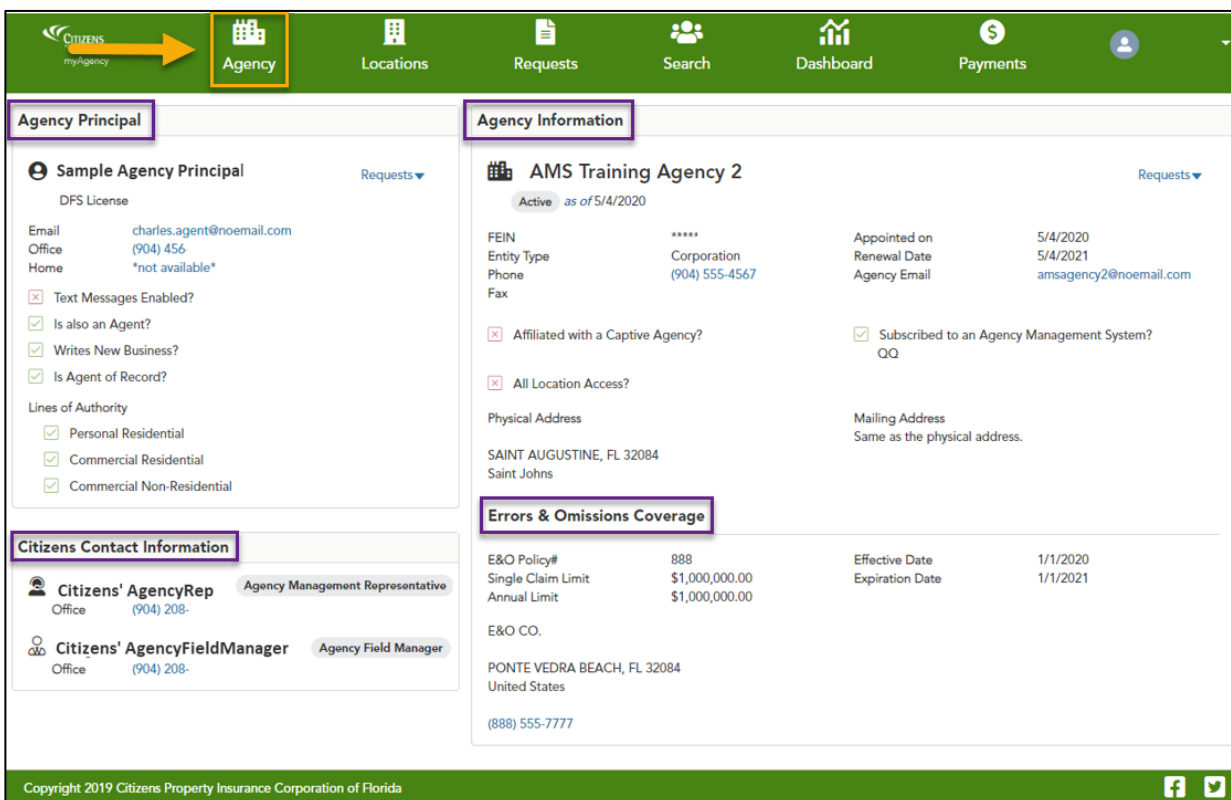
Agency Tab

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*



The screenshot displays the myAgency interface with the 'Agency' tab selected. The main content area is divided into four sections:

- Agency Principal:** Shows details for 'Sample Agency Principal' including email (charles.agent@noemail.com), office phone (904) 456, and home phone (*not available*). It includes checkboxes for 'Text Messages Enabled?' (checked), 'Is also an Agent?' (checked), 'Writes New Business?' (checked), and 'Is Agent of Record?' (checked). Under 'Lines of Authority', 'Personal Residential', 'Commercial Residential', and 'Commercial Non-Residential' are all checked.
- Agency Information:** Shows details for 'AMS Training Agency 2', which is 'Active' as of 5/4/2020. It lists FEIN (****), Entity Type (Corporation), Phone (904) 555-4567, and Agency Email (amsagency2@noemail.com). It also includes checkboxes for 'Affiliated with a Captive Agency?' (unchecked), 'All Location Access?' (unchecked), and 'Subscribed to an Agency Management System?' (checked, QQ).
- Citizens Contact Information:** Lists 'Citizens' AgencyRep' (Agency Management Representative) and 'Citizens' AgencyFieldManager' (Agency Field Manager), both with office phone (904) 208-.
- Errors & Omissions Coverage:** Shows E&O Policy# 888, Single Claim Limit \$1,000,000.00, Annual Limit \$1,000,000.00, Effective Date 1/1/2020, and Expiration Date 1/1/2021. It also lists the E&O CO. as PONTE VEDRA BEACH, FL 32084, United States, with phone (888) 555-7777.

Continued on next page

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.

Agency Principal



Sample Agency Principal

DFS License

Requests ▼

Email	charles.agent@noemail.com
Office	(904) 456
Home	*not available*

Text Messages Enabled?

Is also an Agent?

Writes New Business?

Is Agent of Record?

Lines of Authority

Personal Residential

Commercial Residential

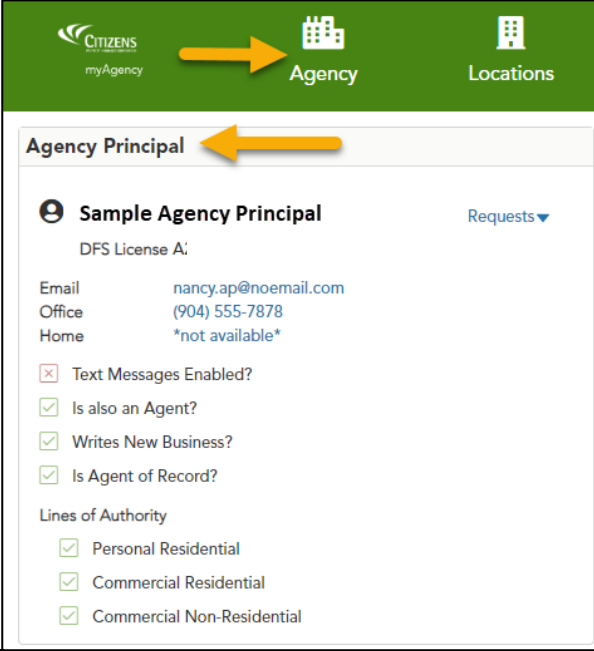
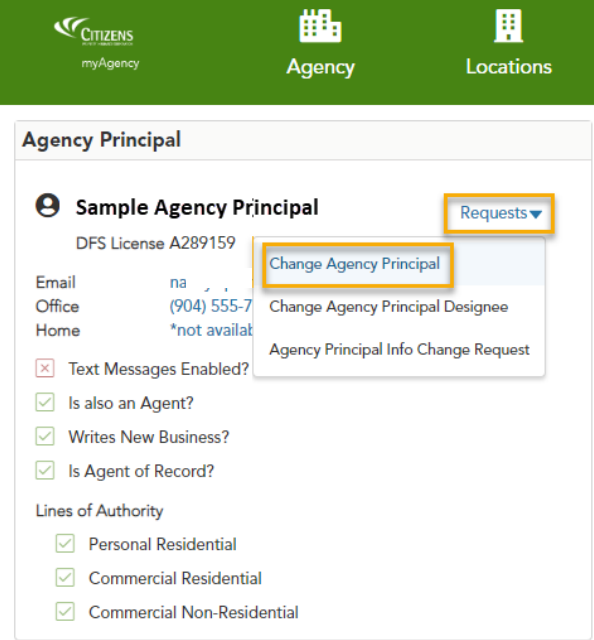
Commercial Non-Residential

Continued on next page

Agency Tab, Continued

Request: Change Agency Principal


To request a change to the AP:

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

Continued on next page

Agency Tab, Continued

Request:
Change
Agency
Principal,
continued

Step	Action
3	<p>Select the new AP from the <i>Select Staff</i> drop-down menu.</p> <div data-bbox="570 489 1412 1052"> <p style="text-align: center;">Agency Principal Change Request</p> <p><i>If this request is not for an existing staff member, the new staff member must be added to a location before submitting a Change Agency Principal request.</i></p> <p>*New Agency Principal</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Select Staff ▼</p> <p>Sample Staff Name - LCR</p> <p>Sample Staff Name Limited Agent</p> <p style="border: 2px solid orange; padding: 2px;">Sample Staff Name Full Agent</p> <p>Sample Staff Name Support Staff</p> </div> <p style="text-align: right;"></p> <p style="text-align: center;"> Submit Cancel Request </p> </div>
4	<p>Indicate if the current AP no longer works for the agency.</p> <p>Result: If checked, the <i>Agent receiving book of business</i> field will appear.</p> <div data-bbox="570 1205 1412 1755"> <p style="text-align: center;">Agency Principal Change Request</p> <p><i>If this request is not for an existing staff member, the new staff member must be added to a location before submitting a Change Agency Principal request.</i></p> <p>*New Agency Principal</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Sample Staff Name Full Agent ▼</p> </div> <p style="color: #c00000; font-weight: bold;">Complete this field.</p> <p><input checked="" type="checkbox"/> Click here if the Agency Principal (Sample Staff Name) no longer works for the agency.</p> <p>Indicate any additional updates needed in the field below</p> <div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div> <p style="text-align: center;"> Submit Cancel Request </p> </div>

Continued on next page

Agency Tab, Continued

Request:
Change
Agency
Principal,
continued

Step	Action
5	<p>If applicable, select an eligible staff member to transfer the book of business to.</p> <p>Indicate if any additional updates are needed, then select Submit.</p> <div data-bbox="581 632 1362 1228" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #4CAF50; color: white; text-align: center; padding: 5px;">Agency Principal Change Request</div> <p><i>If this request is not for an existing staff member, the new staff member must be added to a location before submitting a Change Agency Principal request.</i></p> <p>* New Agency Principal</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between;"> Sample Staff Name Full Agent ▼ </div> <p><input checked="" type="checkbox"/> Click here if the Agency Principal (Sample Staff Name) no longer works for the agency.</p> <p>* Agent receiving the book of business</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between;"> Select Agent ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Sample Staff Name </div> <p><small>Indicate any additional updates needed in the field below</small></p> <div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> Submit Cancel Request </div> </div>

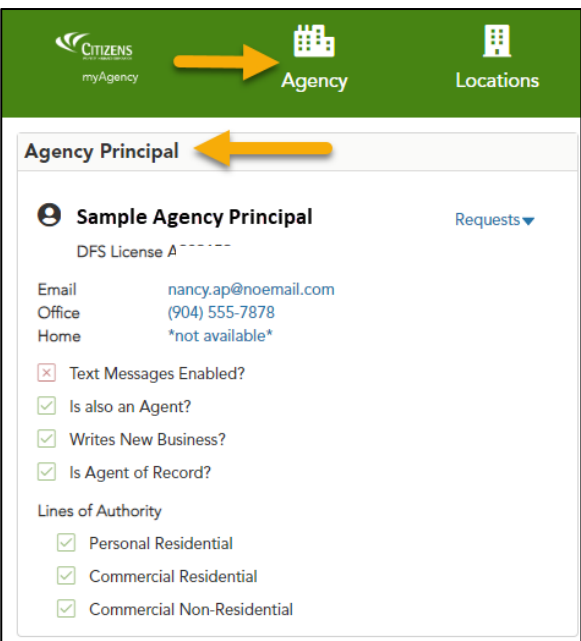
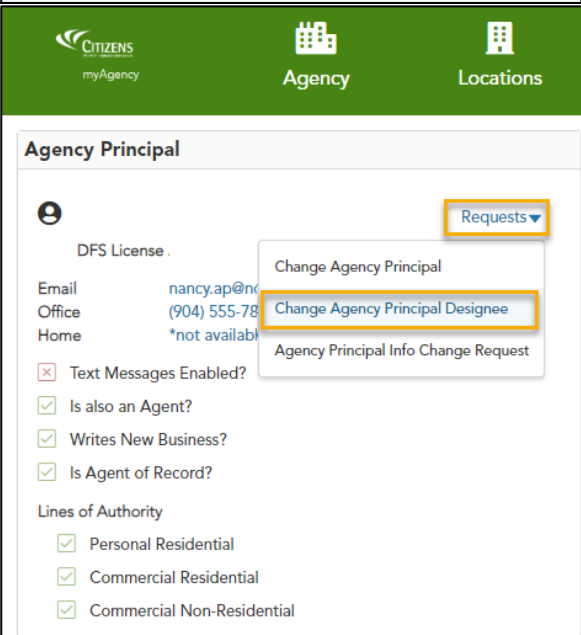
Continued on next page

Agency Tab, Continued

Request: Change Agency Principal Designee

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

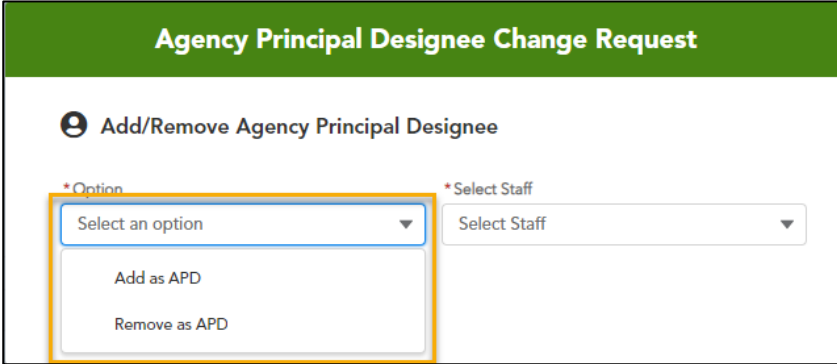
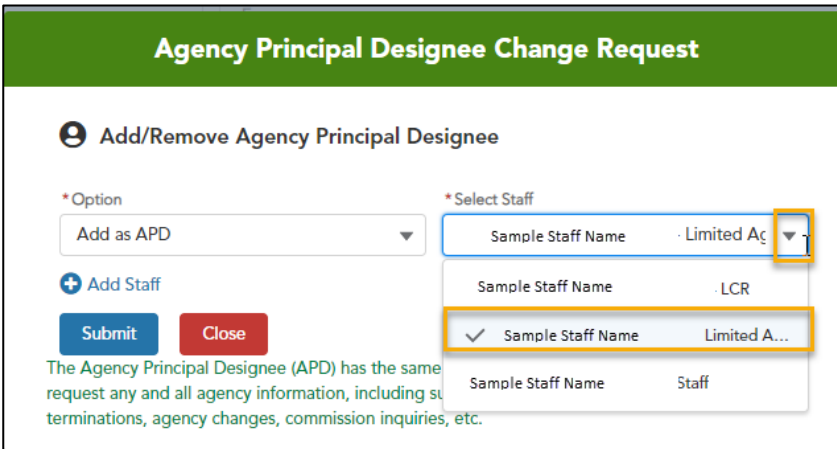
To request a change to the AP designee:

Step	Action	Action
<p>1</p> <p>Access the Agency tab, then navigate to the Agency Principal tile.</p> <p><i>Note:</i> The AP designee must be listed in the <i>Staff</i> section on the <i>Location</i> tab before submitting an <i>Agency Principal Designee Change</i> request.</p>		 <p>The screenshot shows the myAgency header with the 'Agency' tab selected. Below the header, the 'Agency Principal' tile is highlighted with a yellow arrow. The tile displays the name 'Sample Agency Principal', a 'Requests' dropdown menu, and contact information for 'DFS License A'. Below this, there are several checkboxes: 'Text Messages Enabled?' (unchecked), 'Is also an Agent?' (checked), 'Writes New Business?' (checked), and 'Is Agent of Record?' (checked). Under 'Lines of Authority', there are three checked options: 'Personal Residential', 'Commercial Residential', and 'Commercial Non-Residential'.</p>
<p>2</p> <p>Select the Requests drop-down menu, then select Change Agency Principal Designee</p> <p>Result: <i>Agency Principal Designee Change</i> request screen appears.</p>		 <p>The screenshot shows the same 'Agency Principal' tile as in the previous step. The 'Requests' dropdown menu is now open, and the option 'Change Agency Principal Designee' is highlighted with a yellow box. Other options in the dropdown include 'Change Agency Principal' and 'Agency Principal Info Change Request'.</p>

Continued on next page

Agency Tab, Continued


**Request:
Change
Agency
Principal
Designee,
continued**

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

Continued on next page

Agency Tab, Continued

Request:
Change
Agency
Principal
Designee,
continued

Step	Action
5	<p>If additional changes are needed, select Add Staff, then repeat Steps 3 and 4. Select Submit.</p> <div data-bbox="581 478 1385 972" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #4CAF50; color: white; text-align: center; padding: 5px;">Agency Principal Designee Change Request</div> <div style="text-align: center; margin-top: 10px;">  Add/Remove Agency Principal Designee </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%;"> <p><small>* Option</small></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Add as APD</div> <p><small>* Option</small></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Select an option</div> </div> <div style="width: 45%;"> <p><small>* Select Staff</small></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Sample Staff Name - Limited Ac</div> <p><small>* Select Staff</small></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Select Staff</div> </div> </div> <div style="display: flex; justify-content: center; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px; display: flex; align-items: center;"> + Add Staff </div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px; display: flex; align-items: center;"> - Remove Staff </div> </div> <div style="display: flex; justify-content: center; margin-top: 10px;"> <div style="background-color: #0070C0; color: white; padding: 5px 15px; margin-right: 10px; border: 1px solid #0070C0;">Submit</div> <div style="background-color: #C00000; color: white; padding: 5px 15px; border: 1px solid #C00000;">Close</div> </div> <p style="font-size: small; margin-top: 10px;">The Agency Principal Designee (APD) has the same access as the Agency Principal (AP) and can request any and all agency information, including submitting appointment applications, terminations, agency changes, commission inquiries, etc.</p> </div> <p><i>Note:</i> Up to five ADP's can be added per request.</p> <p>Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>

Continued on next page

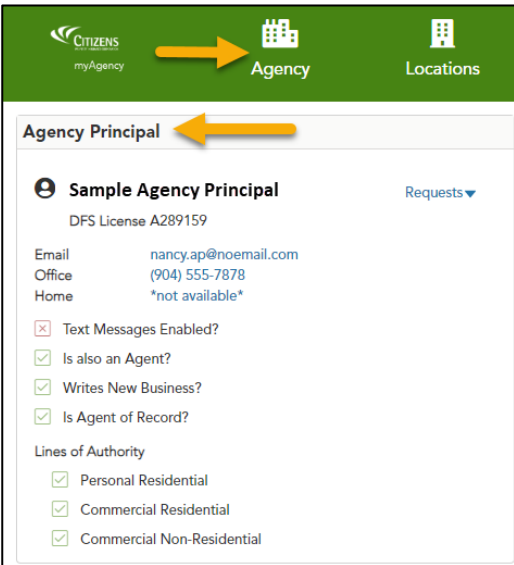
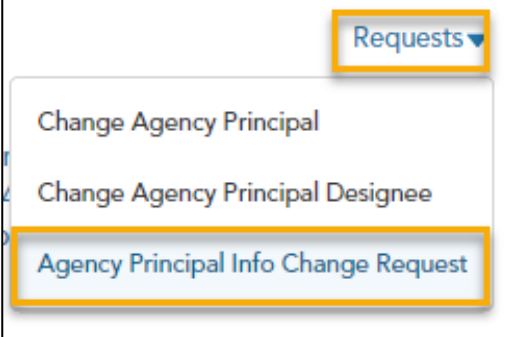
Agency Tab, Continued

**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	<p>Access the Agency tab, then navigate to the Agency Principal tile.</p> 
2	<p>Select the Requests drop-down menu, then select Agency Principal Info Change Request.</p> <p>Result: <i>Agency Principal Info Change Request</i> screen appears.</p> 

Continued on next page

Agency Tab, Continued

**Request:
Agency
Principal Info
Change
Request,
continued**

Step	Action
3	<p>Information currently on file displays. Select a field to update applicable information.</p> <p>If the AP's location has changed, select from an existing location listed in the Change Location drop-down menu.</p> <div data-bbox="581 615 1412 1276" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #4CAF50; color: white; text-align: center; padding: 5px;">Agency Principal Information Change Request</div> <div style="margin-top: 10px;">  <p>Any name changes will require supporting documentation in order to submit the request. To change locations, select from a list of existing locations below.</p> <p>* Change Location <input type="text" value="Sample Location - Main"/> </p> <p>Location Phone</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>* First Name <input type="text" value="Sample"/></p> <p>* Office Phone <input type="text" value="999-555-5555"/></p> <p>Fax <input type="text"/></p> </div> <div style="width: 45%;"> <p>* Email <input type="text" value="agencyprincipal@noemail.com"/></p> <p>* Last Name <input type="text" value="Agency Principal"/></p> <p>Extension <input type="text"/></p> </div> </div> <div style="margin-top: 10px; text-align: center;"> <input type="button" value="Submit"/> <input type="button" value="Cancel Request"/> </div> </div> </div>
4	<p>Select Submit.</p> <p>Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p> <div data-bbox="943 1331 1412 1455" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <div style="display: flex; justify-content: center; gap: 20px;"> <input type="button" value="Submit"/> <input type="button" value="Cancel Request"/> </div> </div>

Continued on next page

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.


Citizens Contact Information



Sample AMR

Office (904) 208-7228

Agency Management Representative



Sample AFM

Office (904) 208-7228

Agency Field Manager

Continued on next page

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.

Agency Information



Sample Agency

[Requests](#)

Active as of 5/4/2020

FEIN	*****	Appointed on	5/4/2020
Entity Type	Corporation	Renewal Date	5/4/2021
Phone	(904) 555-4555	Agency Email	amsagency2@noemail.com
Fax			

Affiliated with a Captive Agency?

All Location Access?

Subscribed to an Agency Management System?
QQSolutions - Quick File

Physical Address

Saint Johns

Mailing Address

Same as the physical address.

Errors & Omissions Coverage

E&O Policy#		Effective Date	1/1/2020
Single Claim Limit	\$1,000,000.00	Expiration Date	1/1/2021
Annual Limit	\$1,000,000.00		

E&O CO.
101 Library Blvd

United States

(888) 555-7777

Continued on next page

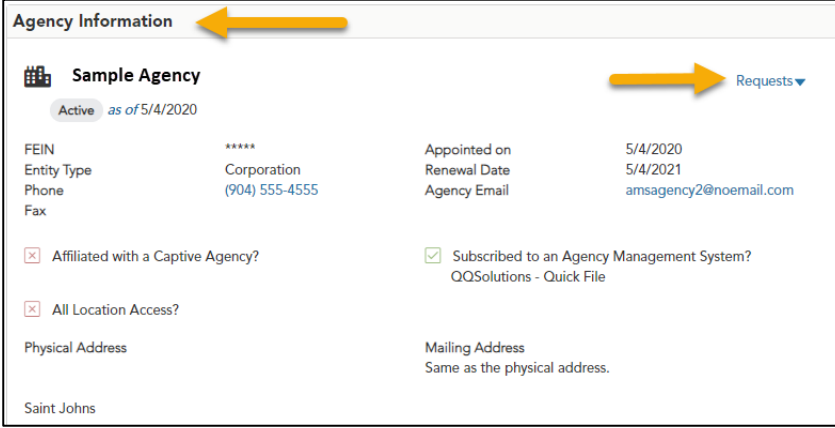
Agency Tab, Continued

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

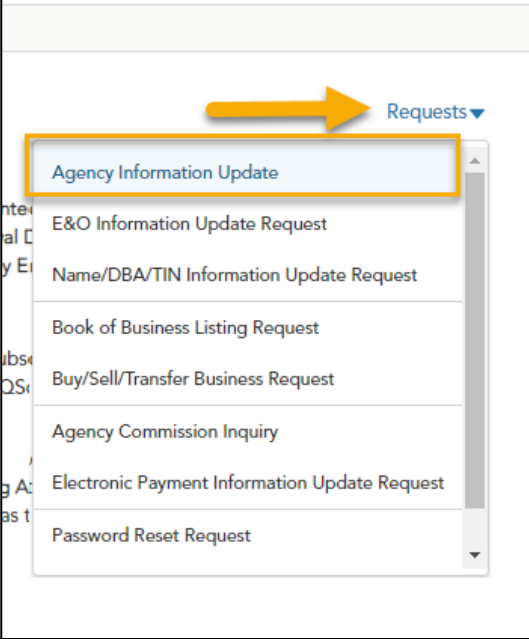
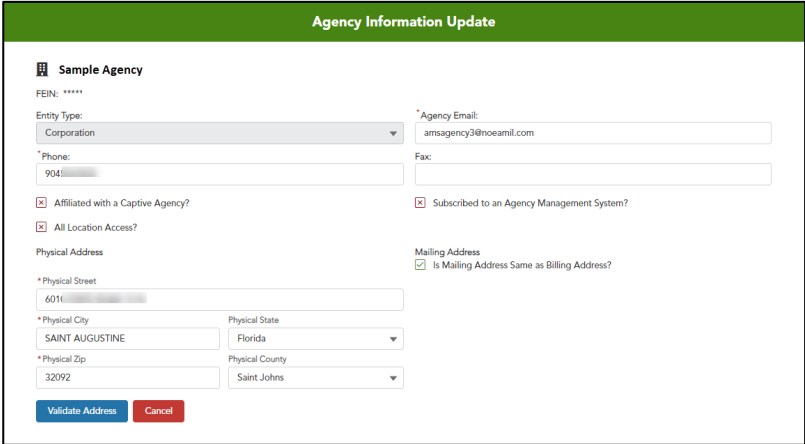
To update any of the above agency information:

Step	Action
1	<p>Access the Agency tab, then navigate to the Agency Information tile.</p> 

Continued on next page

Agency Tab, Continued

Request: Agency Information Update, continued

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

Continued on next page

Agency Tab, Continued

Request:
Agency Information Update,
continued

Step	Action
4	<p>Select Validate Address.</p> <div data-bbox="581 478 1404 840"> <p>* Physical Street 6011</p> <p>* Physical City Physical State SAINT AUGUSTINE Florida</p> <p>* Physical Zip Physical County 32092 Saint Johns</p> <p>Validate Address Cancel</p> </div> <p><i>Note:</i> The address must be standardized, even if no change has been made.]</p> <p>Result: Addresses validated and standardized.</p>
5	<p>Select Save to submit request.</p> <div data-bbox="581 1014 1404 1354"> <p>* Physical City Physical State SAINT AUGUSTINE Florida</p> <p>* Physical Zip Physical County 32092 Saint Johns</p> <p>Save Cancel</p> <p>Addresses validated and standardized.</p> </div> <p>Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>

Continued on next page

Agency Tab, Continued

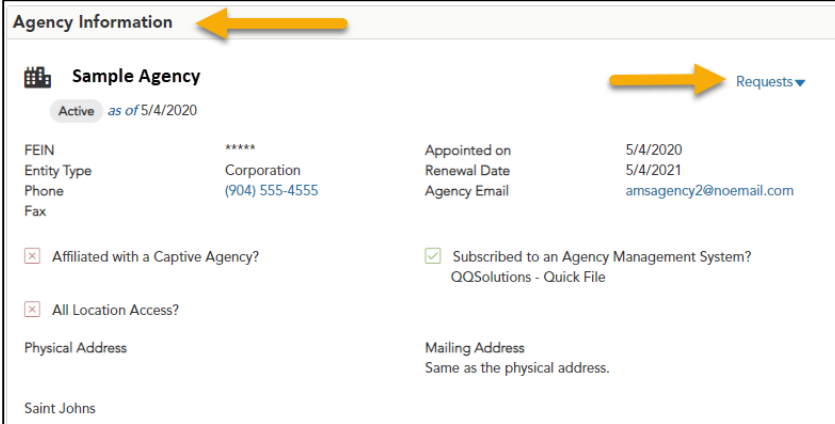
Request: E&O Information Update

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.

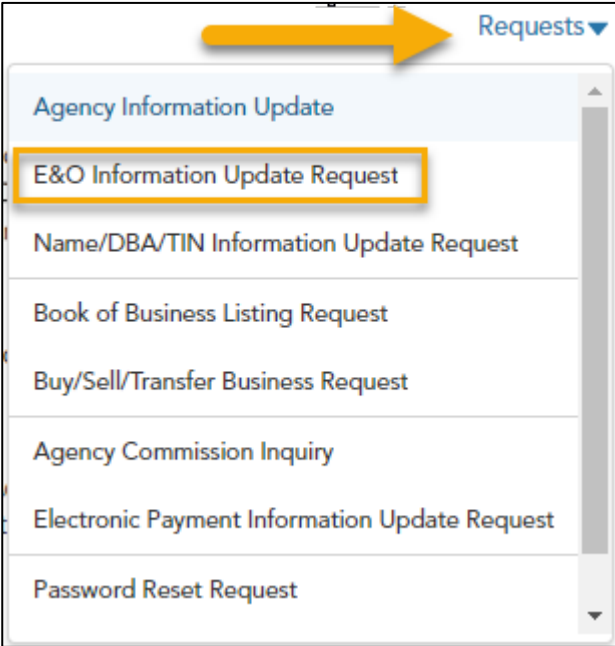
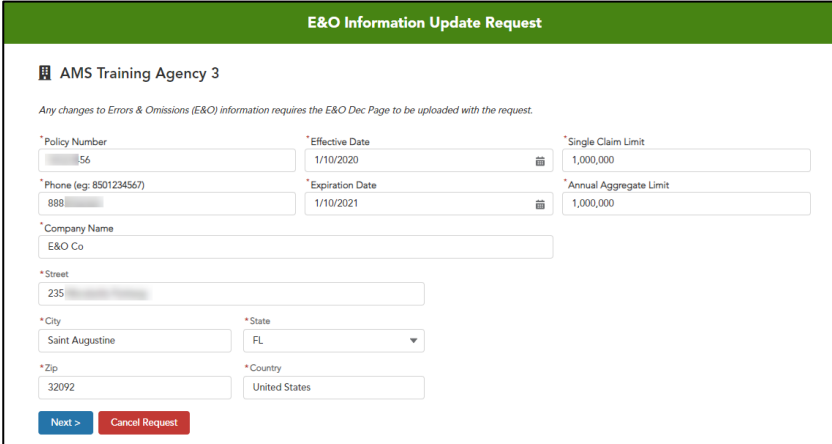
To update any of the above information:

Step	Action
1	<p>Access the <i>Agency</i> tab, then navigate to Requests in the <i>Agency Information</i> tile.</p> 

Continued on next page

Agency Tab, Continued

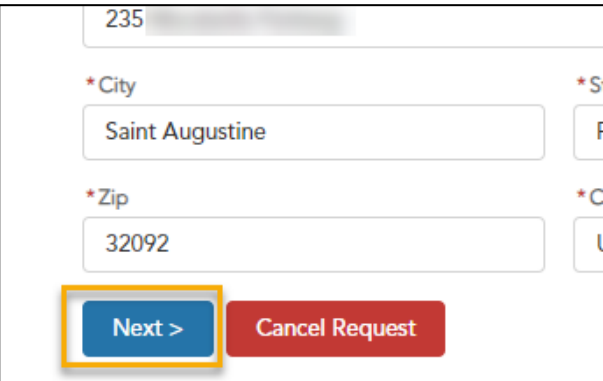
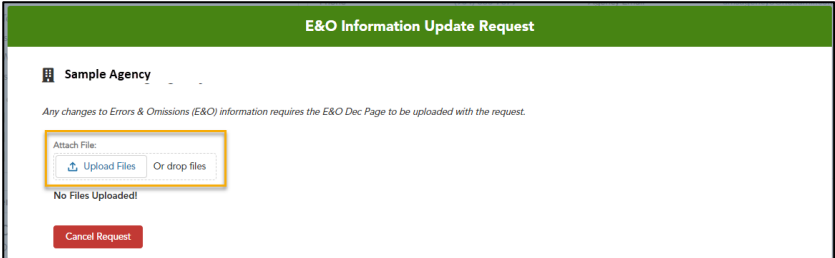
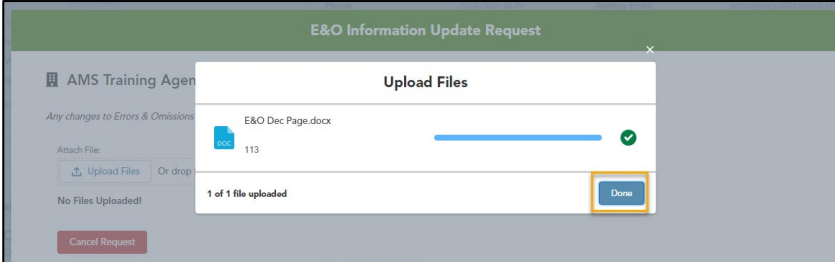
Request: E&O Information Update, continued

Step	Action
2	<p>Select E&O Information Update Request from the <i>Requests</i> drop-down menu.</p> <p>Result: The <i>E&O Update Request</i> window displays.</p> 
3	<p>Select a field to update. Additional fields may appear based on selection. Complete all required fields.</p> 

Continued on next page

Agency Tab, Continued

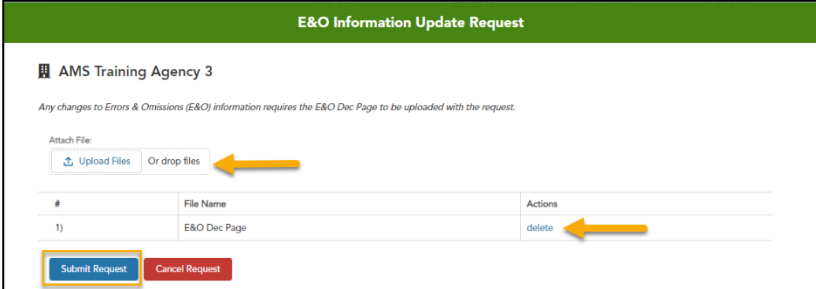
Request: E&O Information Update, continued

Step	Action
4	<p>Select Next.</p> <p>Result: The <i>E&O Information Update Request</i> upload screen displays.</p> 
5	<p>Upload the E&O declarations page.</p>  <p>Result: Upload progress screen will display.</p>
6	<p>Select Done.</p>  <p>Result: A screen summarizing the E&O changes will appear.</p>

Continued on next page

Agency Tab, Continued

Request: E&O Information Update, continued

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

Continued on next page

Agency Tab, Continued

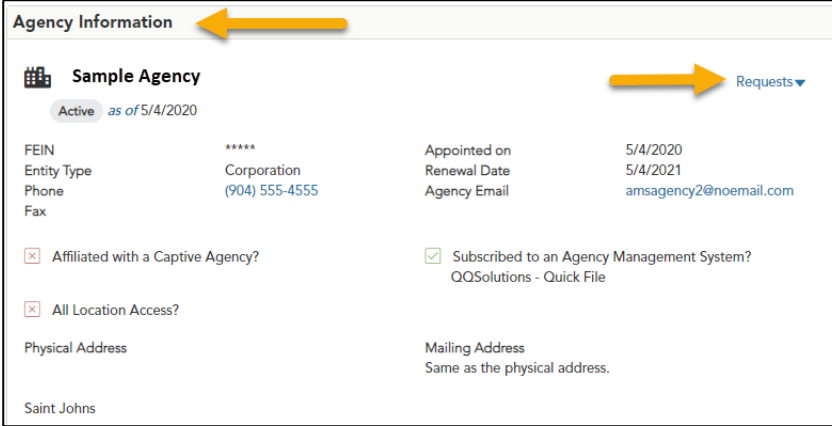
**Request:
Name, DBA,
TIN
Information
Update**

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.

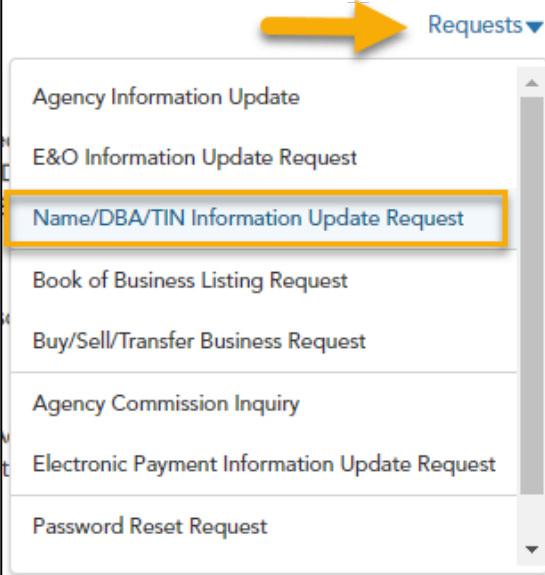
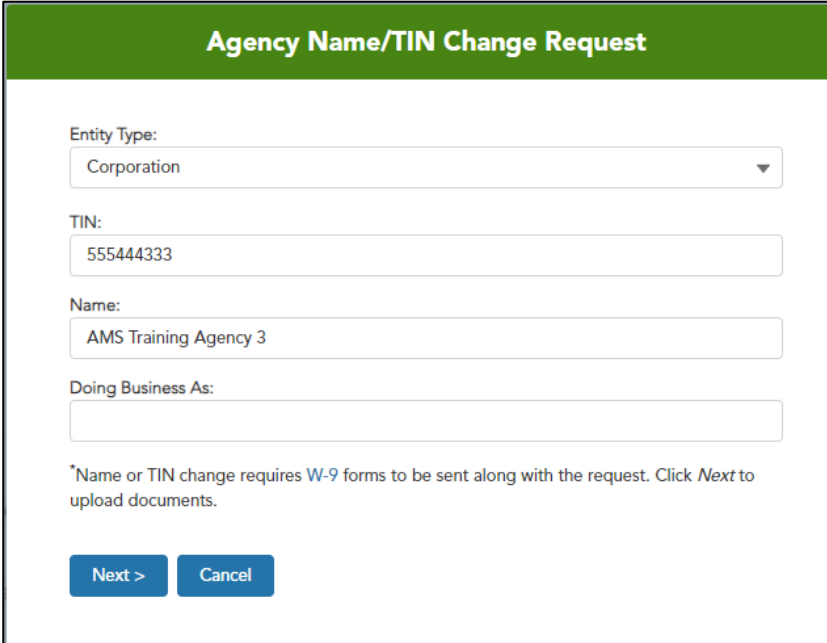
To update any of the fields list above:

Step	Action
1	<p>Access the <i>Agency</i> tab, then navigate to Requests in the <i>Agency Information</i> tile.</p> 

Continued on next page

Agency Tab, Continued

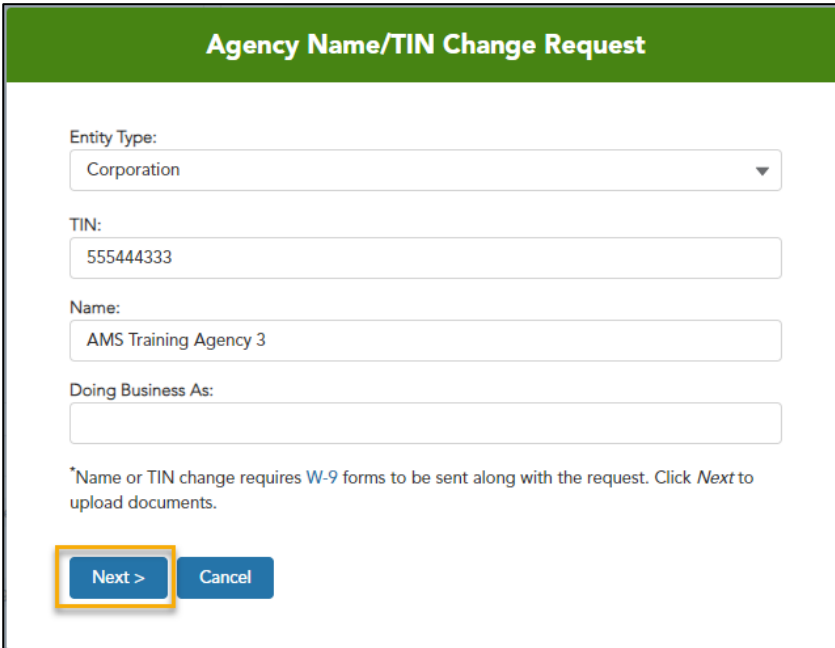
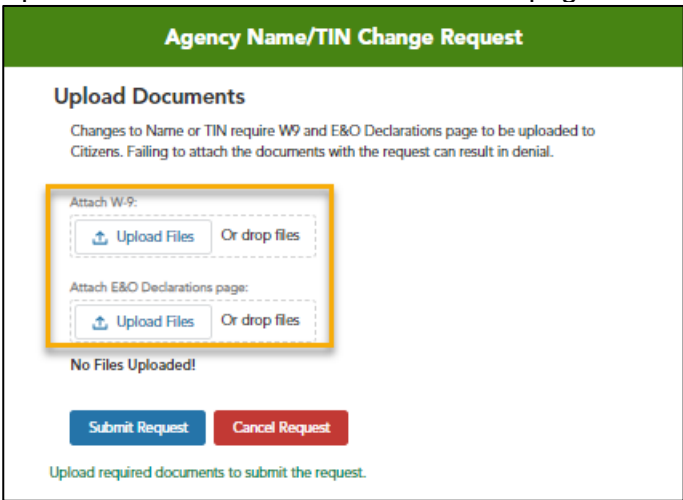
Request:
Name, DBA,
TIN
Information
Update,
continued

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

Continued on next page

Agency Tab, Continued

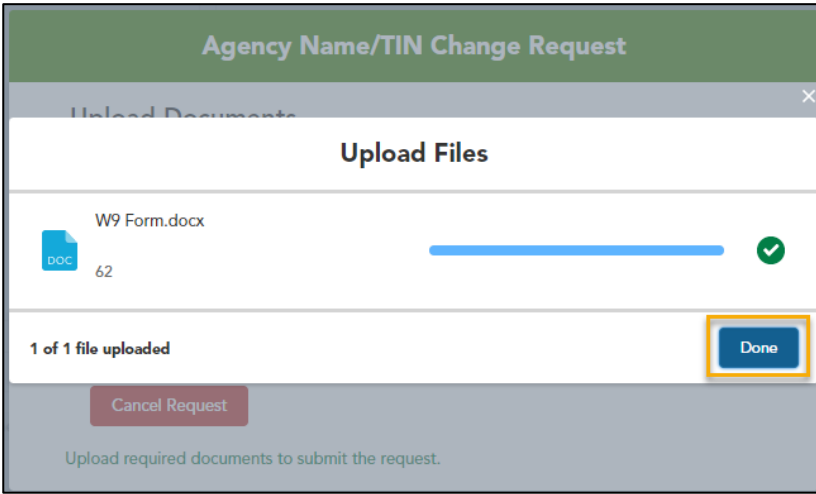
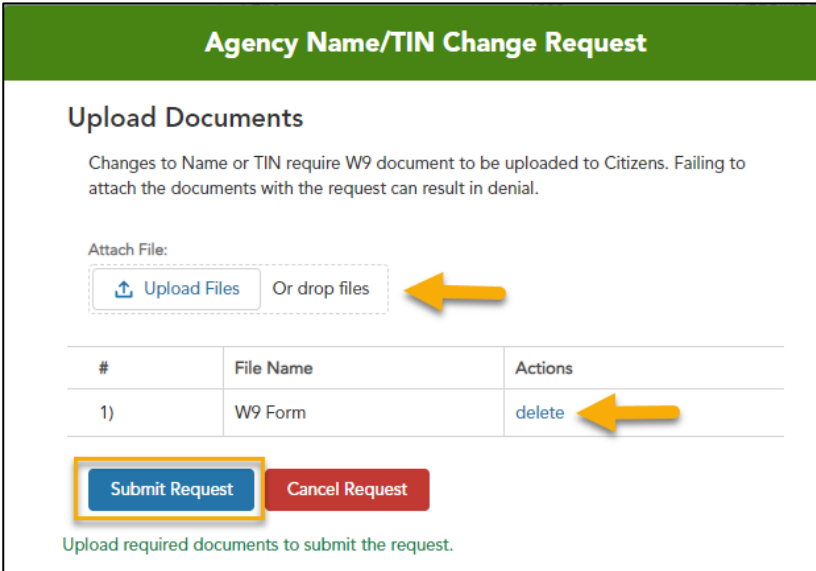
Request:
Name, DBA,
TIN
Information
Update,
continued

Step	Action
4	<p>Select Next to continue.</p>  <p>Agency Name/TIN Change Request</p> <p>Entity Type: Corporation</p> <p>TIN: 555444333</p> <p>Name: AMS Training Agency 3</p> <p>Doing Business As:</p> <p>*Name or TIN change requires W-9 forms to be sent along with the request. Click Next to upload documents.</p> <p>Next > Cancel</p>
5	<p>Result: The upload screen displays.</p> <p>Upload W-9 form and E&O Declarations page.</p>  <p>Agency Name/TIN Change Request</p> <p>Upload Documents</p> <p>Changes to Name or TIN require W9 and E&O Declarations page to be uploaded to Citizens. Failing to attach the documents with the request can result in denial.</p> <p>Attach W-9: Upload Files Or drop files</p> <p>Attach E&O Declarations page: Upload Files Or drop files</p> <p>No Files Uploaded!</p> <p>Submit Request Cancel Request</p> <p>Upload required documents to submit the request.</p>
	<p>Result: The Agency Name/TIN upload progress screen appears.</p>

Continued on next page

Agency Tab, Continued

**Request:
Name, DBA,
TIN
Information
Update,
continued**

Step	Action
6	<p>Select Done.</p>  <p>Result: A list of uploaded documents displays.</p>
7	<p>Review the list of uploaded document(s). If needed, Upload additional files, and/or delete previously uploaded files. When complete, select Submit Request.</p>  <p>Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>

Continued on next page

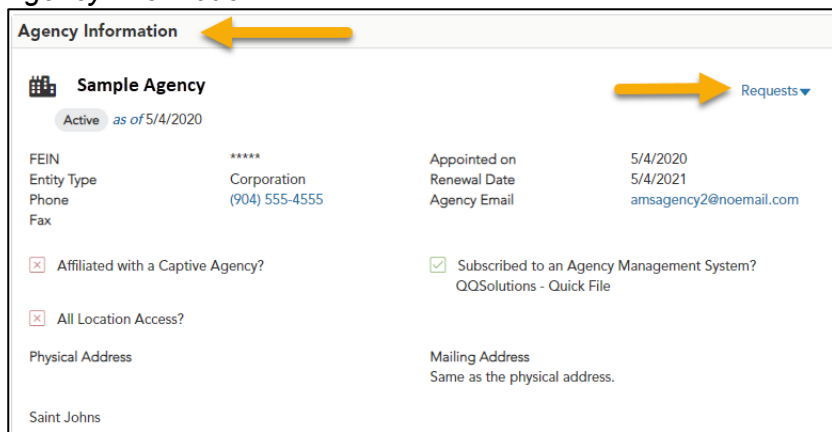
Agency Tab, Continued

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.

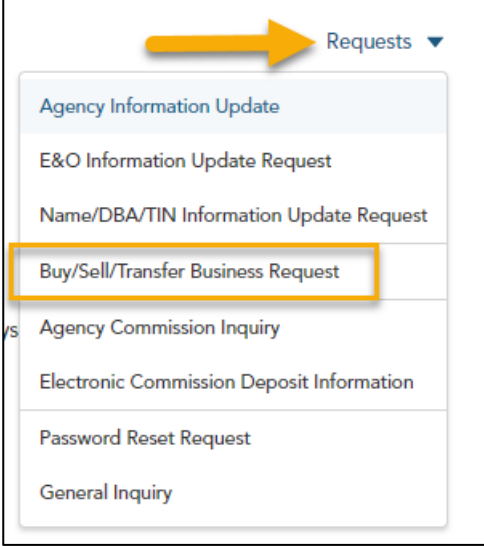
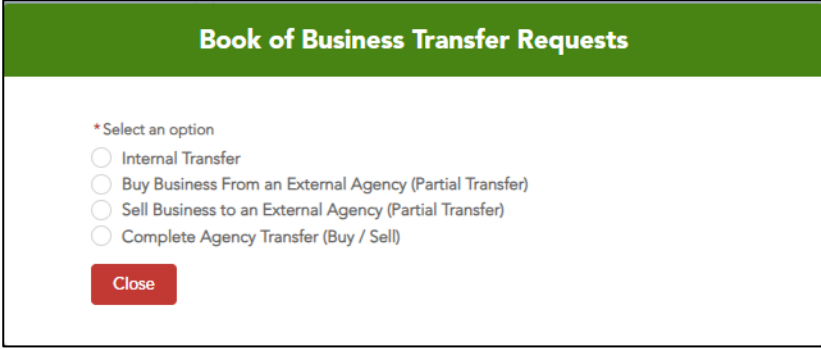
To submit this request:

Step	Action
1	<p data-bbox="576 787 1404 850">Access the <i>Agency</i> tab, then navigate to Requests in the <i>Agency Information</i> tile.</p>  <p>The screenshot shows the 'Agency Information' tile for 'Sample Agency'. At the top, there is a header 'Agency Information' with a yellow arrow pointing to it. Below the header, there is a sub-header 'Sample Agency' with a yellow arrow pointing to the 'Requests' dropdown menu. The tile contains various fields: FEIN (*****), Entity Type (Corporation), Phone ((904) 555-4555), Fax, Appointed on (5/4/2020), Renewal Date (5/4/2021), Agency Email (amsagency2@noemail.com), and checkboxes for 'Affiliated with a Captive Agency?' (unchecked), 'All Location Access?' (unchecked), and 'Subscribed to an Agency Management System?' (checked). The physical address is listed as 'Saint Johns'.</p>

Continued on next page

Agency Tab, Continued

Request: Buy, Sell, Transfer,
continued

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

Continued on next page

Agency Tab, Continued

Request: Buy, Sell, Transfer, continued

Step	Action
4	<p>Complete the applicable fields.</p> <p>If <i>Internal Transfer</i> is selected:</p> <ul style="list-style-type: none"> 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. <div data-bbox="581 716 1409 1073" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; background-color: #4CAF50; color: white; margin: 0;">Book of Business Transfer Requests</p> <p style="margin: 10px 0;">⇄ Transfer Book of Business</p> <p>*Agent who you are transferring policies from *Transfer Effective Date</p> <p>Select an Agent <input type="text"/> <input type="button" value="▼"/> <input type="text"/> <input type="button" value="📅"/></p> <p><input type="checkbox"/> Click here to deactivate the staff member listed above</p> <p style="text-align: center;"><input type="button" value="Next >"/> <input type="button" value="Cancel Request"/></p> </div> <p>If <i>Buy Business from an External Agency (Partial Transfer)</i> is selected:</p> <ul style="list-style-type: none"> A. Enter a valid agency name in the <i>Selling Agency Name</i> field. <i>Note:</i> Begin typing, then select from the list. B. Select the transfer effective date. C. Select the agent in your agency receiving the policies. <div data-bbox="581 1350 1409 1812" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; background-color: #4CAF50; color: white; margin: 0;">Book of Business Transfer Requests</p> <p style="margin: 10px 0;">☰ Agency Book of Business Transfer Request</p> <p>Selling Agency Name *Transfer Effective Date</p> <p><input type="text" value="🔍 Search Agencies..."/> <input type="text"/> <input type="button" value="📅"/></p> <p>Receiving Agent Information:</p> <hr/> <p>*Agent receiving policies</p> <p>Select an Agent <input type="text"/> <input type="button" value="▼"/></p> <p style="text-align: center;"><input type="button" value="Next >"/> <input type="button" value="Cancel Request"/></p> </div>

Step	Action
4, con't	<p>If <i>Sell Business to an External Agency (Partial Transfer)</i> is selected:</p> <ul style="list-style-type: none"> 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. <i>Note:</i> Begin typing, then select from the list. E. Enter the receiving agent's name and their Florida Department of Financial Services (DFS) license number. <div data-bbox="581 737 1393 1308" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="background-color: #4CAF50; color: white; text-align: center; padding: 5px; font-weight: bold;">Book of Business Transfer Requests</div> <div style="padding: 10px;"> <p>☰ Sell Partial Book of Business</p> <p>* Agent who you are transferring policies from * Transfer Effective Date</p> <p>Select an Agent ▼ 📅</p> <p><input checked="" type="checkbox"/> Click here to deactivate the staff member listed above</p> <p>Receiving Agency Information:</p> <p>Receiving Agency Name</p> <p><input style="border: 1px solid orange;" type="text" value="Search Agencies..."/></p> <p>Receiving Agent Name Agent DFS License #</p> <p><input style="border: 1px solid orange;" type="text"/> <input style="border: 1px solid orange;" type="text"/></p> <p style="text-align: center;"> Next > Cancel Request </p> </div> </div> <p>Result: The <i>Book of Business Transfer Request</i> document upload window displays.</p>

Continued on next page

Agency Tab, Continued

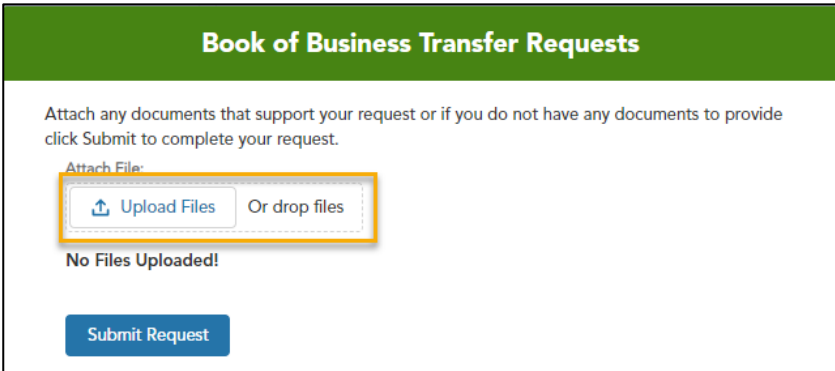
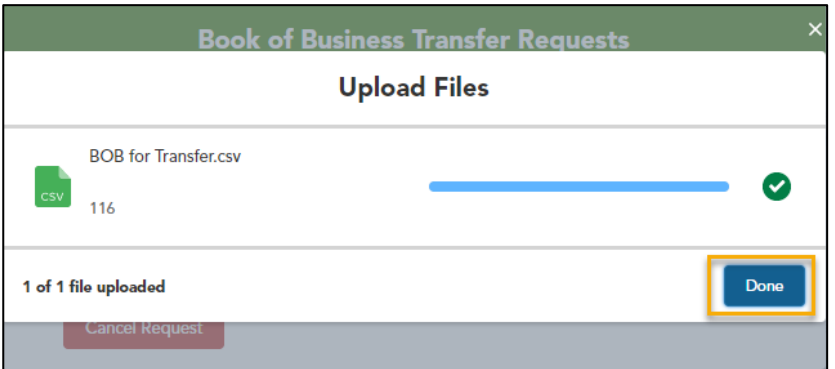
Request: Buy, Sell, Transfer,
continued

Step	Action
4, con't	<p>If Complete Agency Transfer (Buy / Sell) is selected:</p> <p>A. Search agencies to locate selling agency's name. <i>Note:</i> Begin typing, then select from the list.</p> <p>B. Select the transfer effective date.</p> <p>C. Indicate the receiving agency by entering a valid agency name. <i>Note:</i> Begin typing, then select from the list.</p> <p>D. Enter the receiving agent's name and DFS license number.</p> <p>E. Enter any special instructions.</p> <div data-bbox="581 747 1404 1312" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; background-color: #4CAF50; color: white; margin: 0;">Book of Business Transfer Requests</p> <p style="margin: 5px 0;">↔ Agency Book of Business Transfer Request</p> <p style="margin: 5px 0;">Selling Agency Name * Transfer Effective Date</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <input style="width: 95%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="Search Agencies..."/> </div> <div style="width: 35%;"> <input style="width: 95%; border: 1px solid #ccc; padding: 2px 5px;" type="text"/> </div> </div> <p style="margin: 5px 0;">Receiving Agency Name</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <input style="width: 95%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="Search Agencies..."/> </div> <div style="width: 35%;"></div> </div> <p style="margin: 5px 0;">Receiving Agent Name Agent DFS License #</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <input style="width: 95%; border: 1px solid #ccc; padding: 2px 5px;" type="text"/> </div> <div style="width: 35%;"> <input style="width: 95%; border: 1px solid #ccc; padding: 2px 5px;" type="text"/> </div> </div> <p style="margin: 5px 0;">Special Instructions</p> <div style="border: 1px solid #ccc; height: 30px; width: 95%;"></div> <p style="text-align: right; margin: 5px 0;">←</p> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 10px;"> Next > Cancel Request </div> </div>
5	Select Next to continue.

Continued on next page

Agency Tab, Continued

Request: Buy, Sell, Transfer,
continued

Step	Action
6	<p>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.</p> 
<p>Result: The <i>Document Upload</i> progress screen displays.</p>	
7	<p>Select Done.</p> 

Continued on next page

Agency Tab, Continued

Request: Buy, Sell, Transfer,
continued

Step	Action						
8	<p>Review the list of uploaded document(s). If needed, Upload additional files and/or delete a previously uploaded files. When complete, select Submit Request.</p> <div data-bbox="581 548 1404 982" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; background-color: #4CAF50; color: white; margin: 0;">Book of Business Transfer Requests</p> <p>Upload an excel spreadsheet with the list of policies, including insured name and policy number which should be signed by the relinquishing and purchasing Agency Principals.</p> <p>Attach File:</p> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <input type="button" value="Upload Files"/> Or drop files ← </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>#</th> <th>File Name</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>1)</td> <td>BOB for Transfer</td> <td style="text-align: center;">delete ←</td> </tr> </tbody> </table> <div style="display: flex; justify-content: center; margin-top: 10px;"> <input type="button" value="Submit Request"/> <input type="button" value="Cancel Request"/> </div> </div> <p>Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>	#	File Name	Actions	1)	BOB for Transfer	delete ←
#	File Name	Actions					
1)	BOB for Transfer	delete ←					

Continued on next page

Agency Tab, Continued

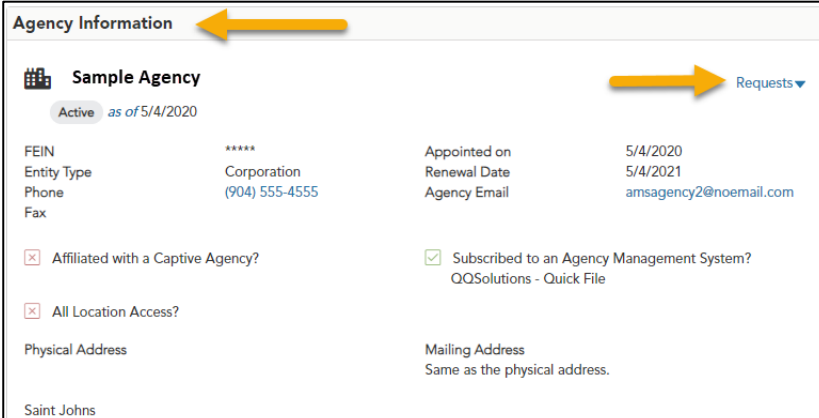
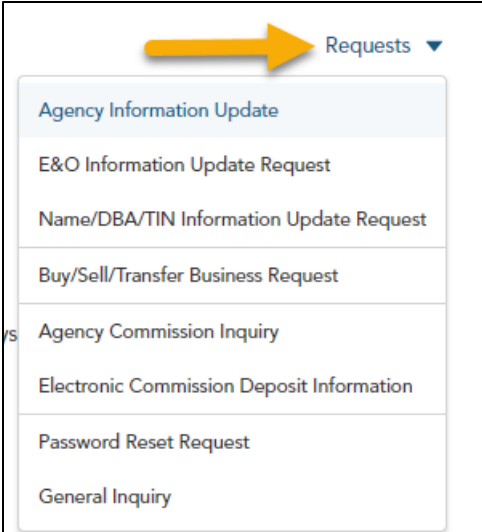
**Request:
Agency
Commission
Inquiry**

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.

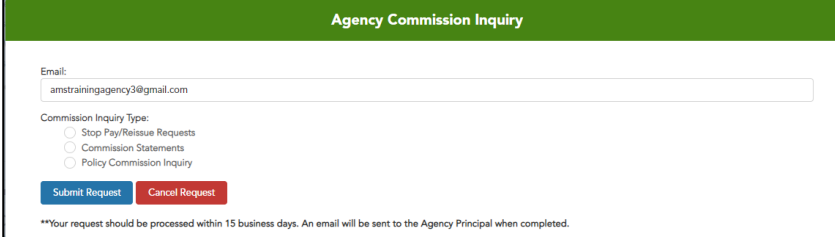
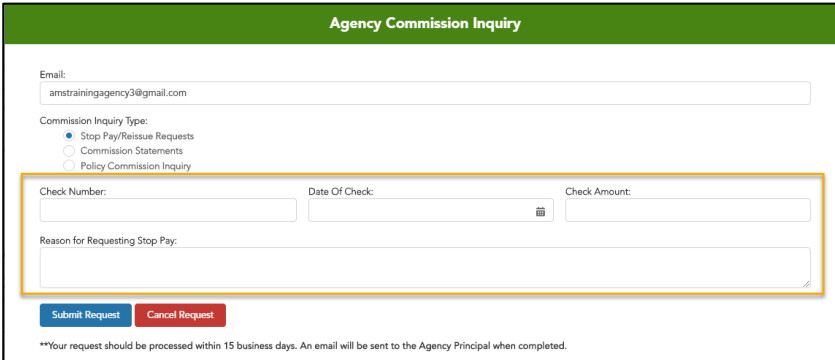
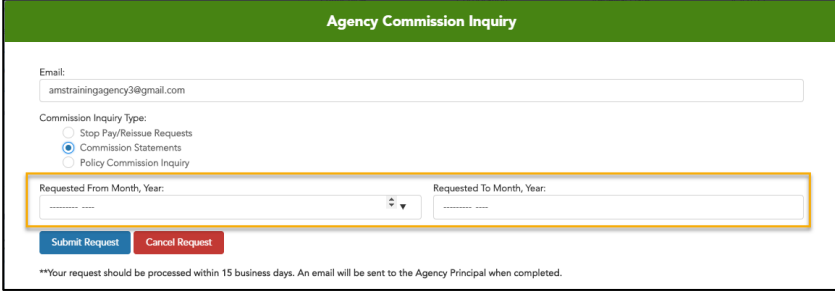
To submit an *Agency Commission Inquiry*:

Step	Action
1	<p>Access the <i>Agency</i> tab, then navigate to Requests in the <i>Agency Information</i> tile.</p> 
2	<p>Select the Requests drop-down, then select Agency Commission Inquiry</p>  <p>Result: <i>The Agency Commission Inquiry</i> screen appears.</p>

Continued on next page

Agency Tab, Continued

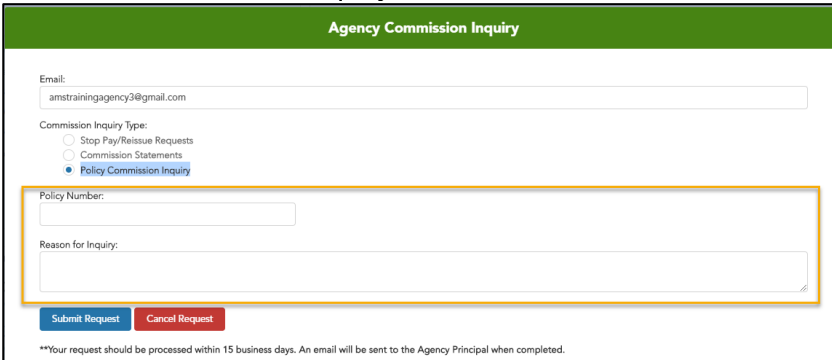

Request:
Agency Commission Inquiry,
continued

Step	Action
3	<p>Confirm the displayed email address, then select the appropriate action.</p>  <p>Agency Commission Inquiry</p> <p>Email: amstrainingagency3@gmail.com</p> <p>Commission Inquiry Type:</p> <ul style="list-style-type: none"> <input type="radio"/> Stop Pay/Reissue Requests <input type="radio"/> Commission Statements <input type="radio"/> Policy Commission Inquiry <p>Submit Request Cancel Request</p> <p><small>**Your request should be processed within 15 business days. An email will be sent to the Agency Principal when completed.</small></p>
4	<p>Result: Based on the selection, different screens will display.</p> <p>Complete the applicable fields.</p> <p>If submitting a <i>Stop Pay/Reissue Request</i>, complete the <i>Check Number</i>, <i>Date of Check</i>, <i>Check Amount</i>, and <i>Reason for Requesting Stop Pay</i> fields shown below.</p>  <p>Agency Commission Inquiry</p> <p>Email: amstrainingagency3@gmail.com</p> <p>Commission Inquiry Type:</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Stop Pay/Reissue Requests <input type="radio"/> Commission Statements <input type="radio"/> Policy Commission Inquiry <p>Check Number: _____ Date Of Check: _____ Check Amount: _____</p> <p>Reason for Requesting Stop Pay: _____</p> <p>Submit Request Cancel Request</p> <p><small>**Your request should be processed within 15 business days. An email will be sent to the Agency Principal when completed.</small></p> <p>If requesting <i>Commission Statements</i>, complete the <i>Requested From Month, Year</i> and <i>Requested To Month, Year</i> fields shown below.</p>  <p>Agency Commission Inquiry</p> <p>Email: amstrainingagency3@gmail.com</p> <p>Commission Inquiry Type:</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Stop Pay/Reissue Requests <input type="radio"/> Commission Statements <input type="radio"/> Policy Commission Inquiry <p>Requested From Month, Year: _____ Requested To Month, Year: _____</p> <p>Submit Request Cancel Request</p> <p><small>**Your request should be processed within 15 business days. An email will be sent to the Agency Principal when completed.</small></p>

Continued on next page

Agency Tab, Continued

Request:
Agency
Commission
Inquiry,
continued

Step	Action
4, con't	<p>If submitting a <i>Policy Commission Inquiry</i>, enter the policy number and reason for inquiry.</p>  <p>Agency Commission Inquiry</p> <p>Email: amstrainingagency3@gmail.com</p> <p>Commission Inquiry Type: <input type="radio"/> Stop Pay/Reissue Requests <input type="radio"/> Commission Statements <input checked="" type="radio"/> Policy Commission Inquiry</p> <p>Policy Number: <input type="text"/></p> <p>Reason for Inquiry: <input type="text"/></p> <p><input type="button" value="Submit Request"/> <input type="button" value="Cancel Request"/></p> <p><small>**Your request should be processed within 15 business days. An email will be sent to the Agency Principal when completed.</small></p>
5	<p>Select Submit Request.</p>  <p>Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>

Continued on next page

Agency Tab, Continued

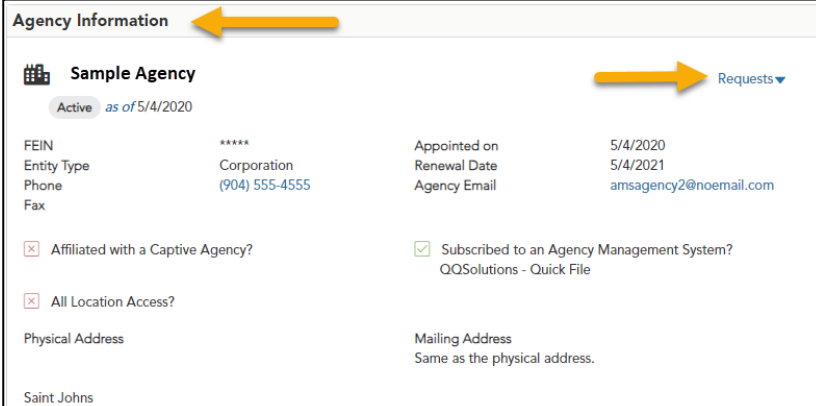
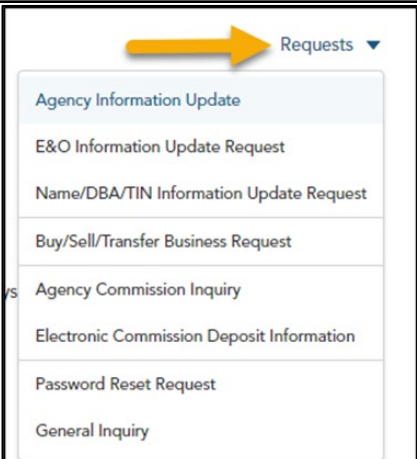
Request: Electronic Payment Information Update

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:

Step	Action
1	<p>Access the <i>Agency</i> tab, then navigate to Requests in the <i>Agency Information</i> tile.</p> 
2	<p>Select the Requests drop-down, then select Electronic Payment Information Update Request.</p> <p>Result: <i>Electronic Commission Deposit Information</i> screen appears.</p> 

Continued on next page

Agency Tab, Continued

Request:
Electronic Payment Information Update,
continued

Step	Action
3	<p>If necessary, update the <i>Banking information</i>, select the <i>Acknowledgement Statement</i>, then click Accept.</p> <div data-bbox="581 516 1404 1516" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #4CAF50; color: white; text-align: center; padding: 5px; font-weight: bold;">Electronic Commission Deposit Information</div> <div style="margin-top: 10px;"> <p> ACG SOUTH INSURANCE AGENCY- Testing</p> <p>FFIN: ****6230</p> <div style="border: 2px solid orange; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>* Bank Routing Number:</p> <input type="text" value="063100277"/> </div> <div style="width: 45%;"> <p>* Bank Account Number:</p> <input type="text" value="1254123"/> </div> </div> <div style="margin-top: 5px;"> <p>* Bank Account Type:</p> <input type="text" value="Checking"/> </div> </div> <p style="font-size: small; margin-top: 10px;">This authorization is used to start or change direct deposit for payments received from Citizens Property Insurance Corporation. Citizens will use the information provided in this authorization to generate ACH payments to the account reflected. Citizens can deposit in only one account per agency.</p> <p style="font-size: small;">To review the Terms and Conditions, click here.</p> <p><input checked="" type="checkbox"/> I acknowledge that I have reviewed the Terms and Conditions of this Direct Deposit Authorization and that I agree to the same</p> <p style="font-size: small; margin-top: 10px;">AUTHORIZATION: By clicking "ACCEPT" below, I warrant that I have full authority to complete this form on behalf of my Agency. I understand that if I am starting direct deposit, or changing any information, I am authorizing Citizens to initiate credit entries to the financial institution and account provided above. I am also authorizing Citizens to initiate debit entries, if necessary, in order to reverse a credit entry that was made in error. I agree that Citizens may, but is under no obligation to, verify the accuracy of the account information provided with the financial institution. I hereby authorize these payment instructions and accept the terms and conditions for direct deposits provided with this form.</p> <div style="display: flex; justify-content: center; margin-top: 10px;"> <div style="border: 2px solid orange; padding: 5px; margin-right: 10px;">Accept</div> <div style="background-color: #f44336; color: white; padding: 5px; margin-right: 10px;">Cancel</div> </div> <p style="font-size: small; color: red; margin-top: 10px;">• Acknowledge the direct deposit authorization in order to submit the request.</p> </div> </div>

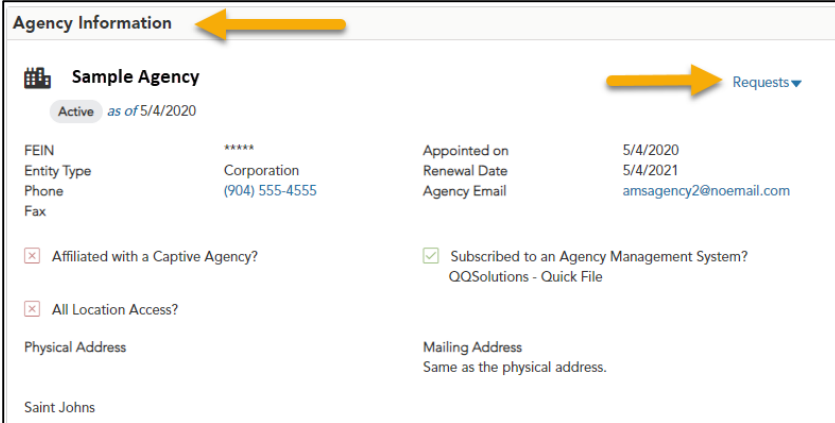
Continued on next page

Agency Tab, Continued

Request: Password Reset

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

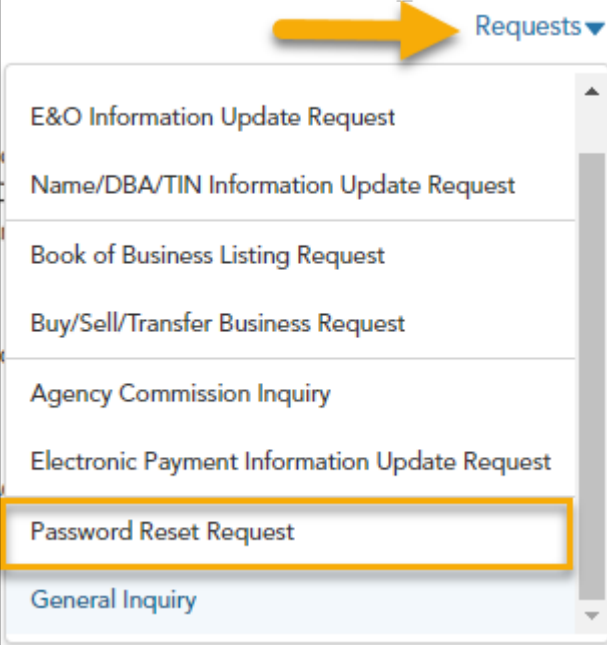
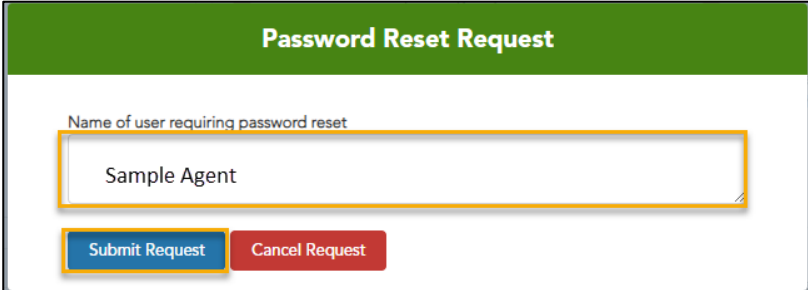
To submit a password reset request:

Step	Action
1	<p>Access the <i>Agency</i> tab, then navigate to Requests in the <i>Agency Information</i> tile.</p>  <p>The screenshot shows the 'Agency Information' tile for 'Sample Agency'. A yellow arrow points to the 'Agency Information' header, and another yellow arrow points to the 'Requests' dropdown menu in the top right corner of the tile. The tile contains the following information:</p> <ul style="list-style-type: none"> Agency Name: Sample Agency Status: Active as of 5/4/2020 FEIN: ***** Entity Type: Corporation Phone: (904) 555-4555 Appointed on: 5/4/2020 Renewal Date: 5/4/2021 Agency Email: amsagency2@noemail.com Fax: (blank) <input type="checkbox"/> Affiliated with a Captive Agency? <input checked="" type="checkbox"/> Subscribed to an Agency Management System? QQSolutions - Quick File <input type="checkbox"/> All Location Access? Physical Address: Saint Johns Mailing Address: Same as the physical address.

Continued on next page

Agency Tab, Continued

Request: Password Reset, continued

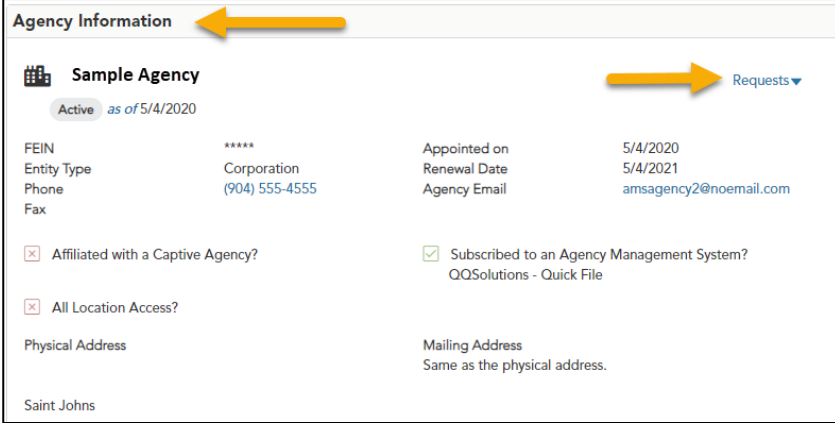
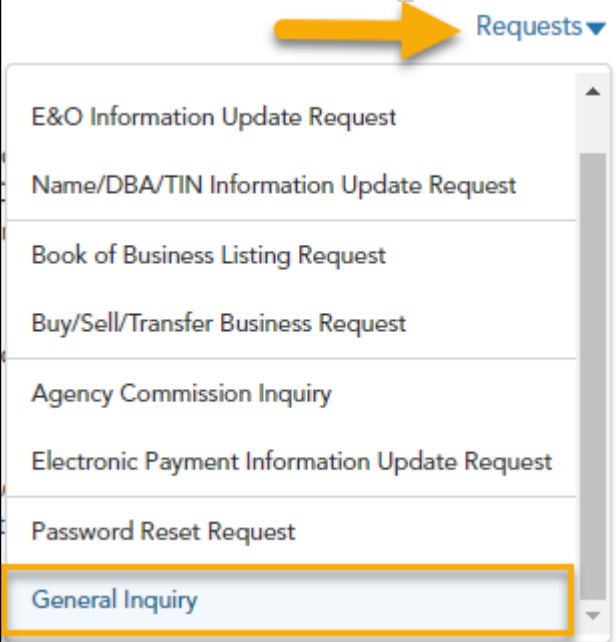
Step	Action
<p>2</p> <p>Select the Requests drop-down menu, then select Password Reset Request</p> <p>Result: <i>Password Reset Request</i> screen appears.</p>	
<p>3</p> <p>Enter the name of user requiring password reset, then select Submit Request.</p>	 <p>Result: A confirmation banner will display,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

Continued on next page

Agency Tab, Continued

Request: General Inquiry

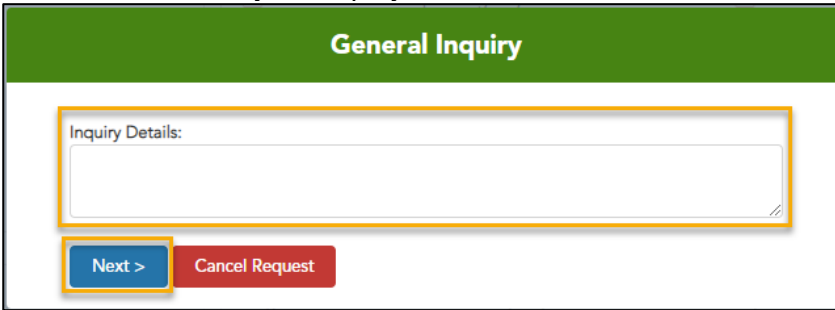
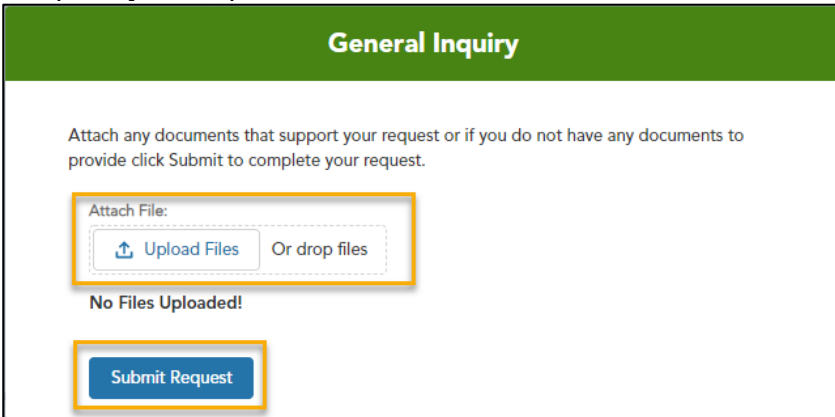
To submit a *General Inquiry* request:

Step	Action
1	<p>Access the <i>Agency</i> tab, then select Requests in the <i>Agency Information</i> tile.</p> 
2	<p>Select the Requests drop-down, then select General Inquiry</p> <p>Result: <i>The General Inquiry</i> screen appears.</p> 

Continued on next page

Agency Tab, Continued

Request:
General Inquiry,
continued

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

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.

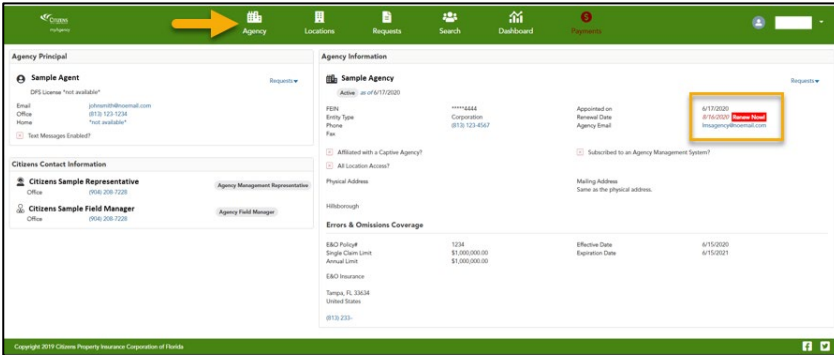
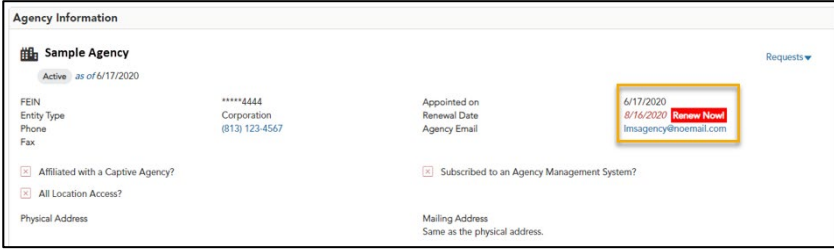
Processing Appointment Renewals

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.

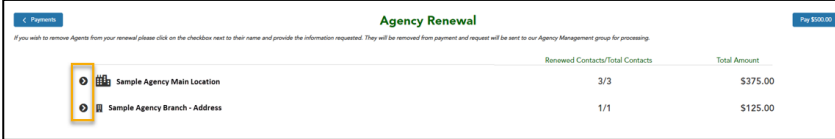

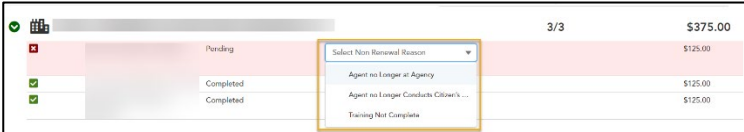
To process an agent/agency appointment renewal:

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

Continued on next page

Appointment Renewals, Continued

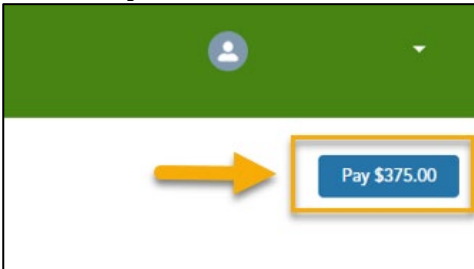
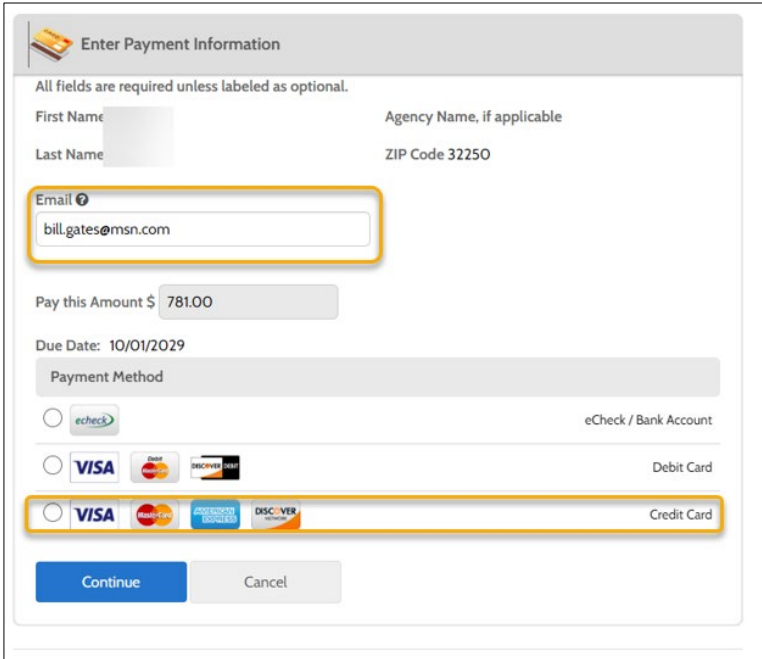
Processing Appointment Renewals, continued

Step	Action
3	<p>To review a list of appointed agents for each agency location, select the arrow next to each location.</p>  <p>Result: All staff assigned to the location displays. Review to confirm accuracy. If changes are not needed, continue to Step 6.</p>
4	<p>If changes to appointed agents are needed, select the green check next to their name.</p>  <p>Result: The line will highlight and drop-down menu options will display.</p> <p><i>Note:</i> 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.</p>
5	<p>Select a nonrenewal reason and, if appropriate, an agent to transfer the book of business to.</p>  <p>Result: The recalculated amount due will display.</p>

Continued on next page

Appointment Renewals, Continued





Processing Appointment Renewals, continued

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

Continued on next page

Appointment Renewals, Continued

Processing Appointment Renewals, continued

Step	Action
8	<p>Ensure payment information is correct, then select Continue:</p> <div data-bbox="581 485 1377 1419" style="border: 1px solid #ccc; padding: 10px;"> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;">  Enter Payment Information </div> <p>All fields are required unless labeled as optional.</p> <p>First Name <input type="text"/> Agency Name, if applicable</p> <p>Last Name <input type="text"/> ZIP Code 32250</p> <p>Email <input type="text" value="bill.gates@msn.com"/></p> <p>Pay this Amount \$ <input type="text" value="781.00"/></p> <p>Due Date: 10/01/2029</p> <p>Payment Method</p> <p><input type="radio"/>  eCheck / Bank Account</p> <p><input type="radio"/>  Debit Card</p> <p><input checked="" type="radio"/>  Credit Card</p> <p>Card Number <input type="text"/> CVV <input type="text" value="***"/></p> <p>Expiration Date <input type="text" value="04 - April"/> <input type="text" value="2024"/></p> <p>Card Holder Name <input type="text"/></p> <p>Zip Code <input type="text"/></p> <p><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p> </div> <p>Result: The <i>Confirm Payment</i> screen will appear.</p>

Continued on next page

Appointment Renewals, Continued

Processing Appointment Renewals, continued

Step	Action
9	<p>The payment amount will display. elect the Authorize box before proceeding to the blue 'Pay \$0.00' button at the bottom of the screen.</p> <div data-bbox="581 548 1162 999" style="border: 1px solid black; padding: 10px;"> </div> <p>Note: You must agree to the terms and conditions prior to proceeding.</p>
10	<p>The Payment Receipt will generate if processed successfully. Options will appear at the bottom of the confirmation to either Print or return Back to Home. Payment confirmation will be sent to the email on file.</p> <div data-bbox="581 1205 1079 1711" style="border: 1px solid black; padding: 10px;"> </div>

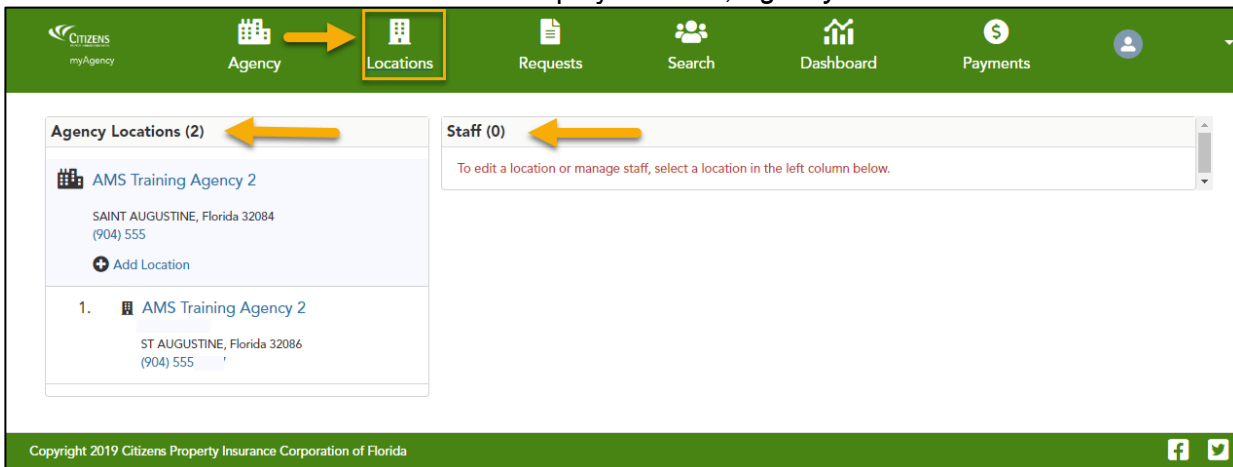
Locations Tab

Functions Overview

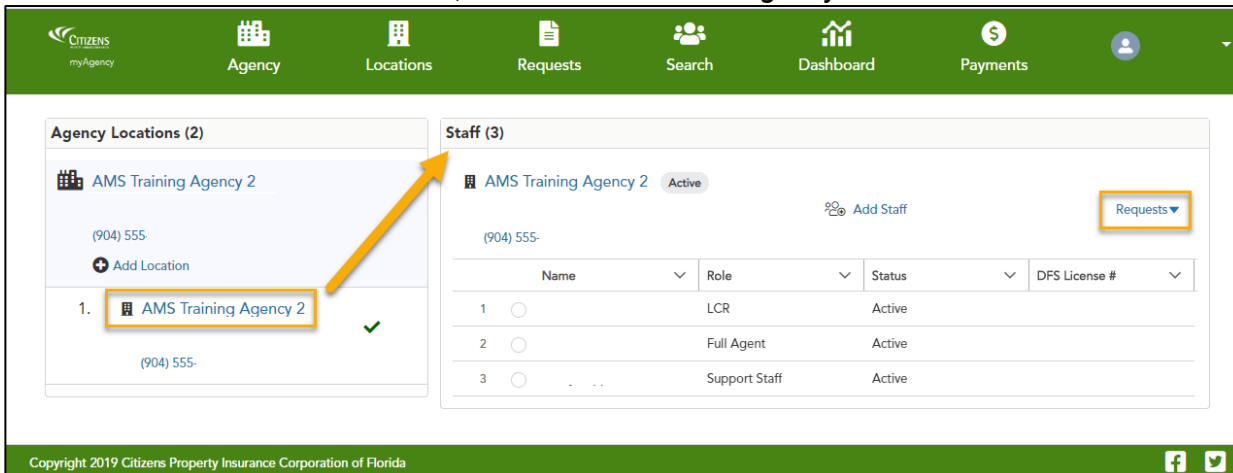
The *Locations* tab enables APs to view and manage staff, appointments and location details:

- 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*.



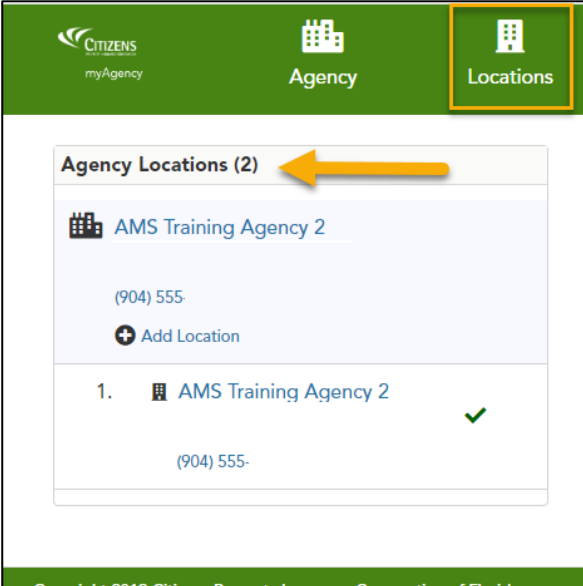
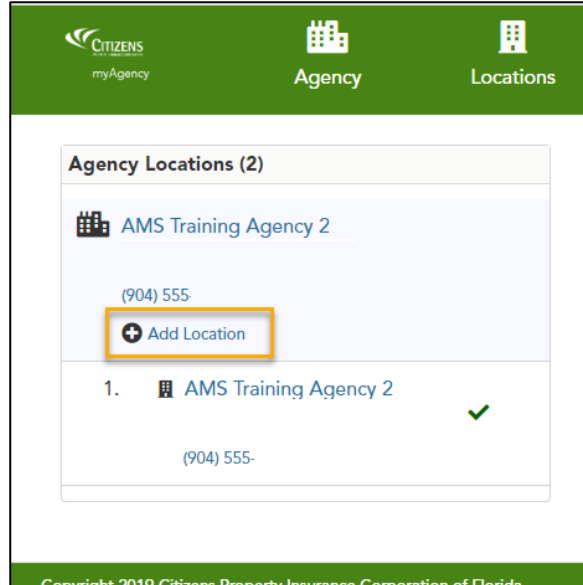
Continued on next page

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.

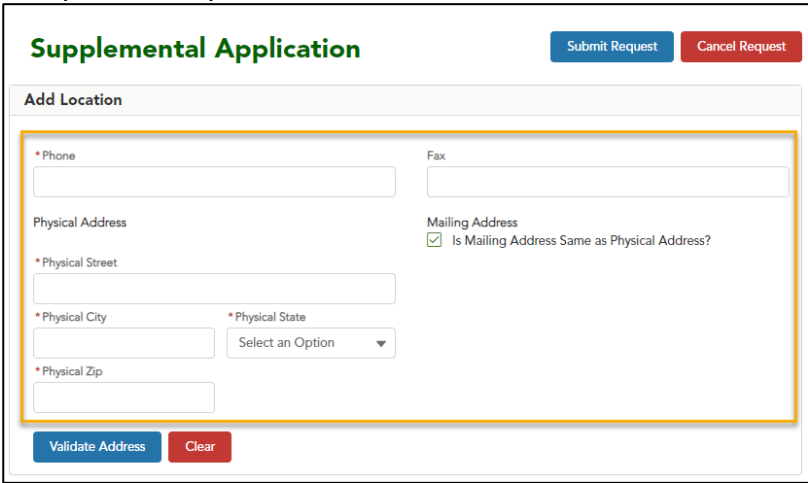
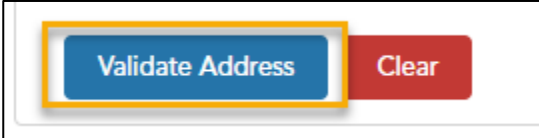
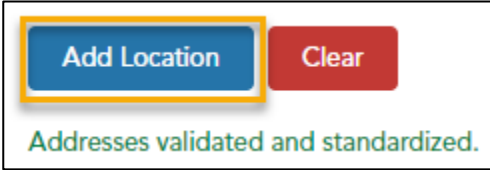
If a new location needs to be added:

Step	Action
<p>1</p> <p>Access the Locations tab, then navigate to the <i>Agency Locations</i> tile.</p>	 <p>Copyright 2019 Citizens Property Insurance Corporation of Florida</p>
<p>2</p> <p>Select Add Location.</p> <p>Result: The <i>Supplemental Application</i> screen displays.</p>	 <p>Copyright 2019 Citizens Property Insurance Corporation of Florida</p>

Continued on next page

Locations Tab, Continued

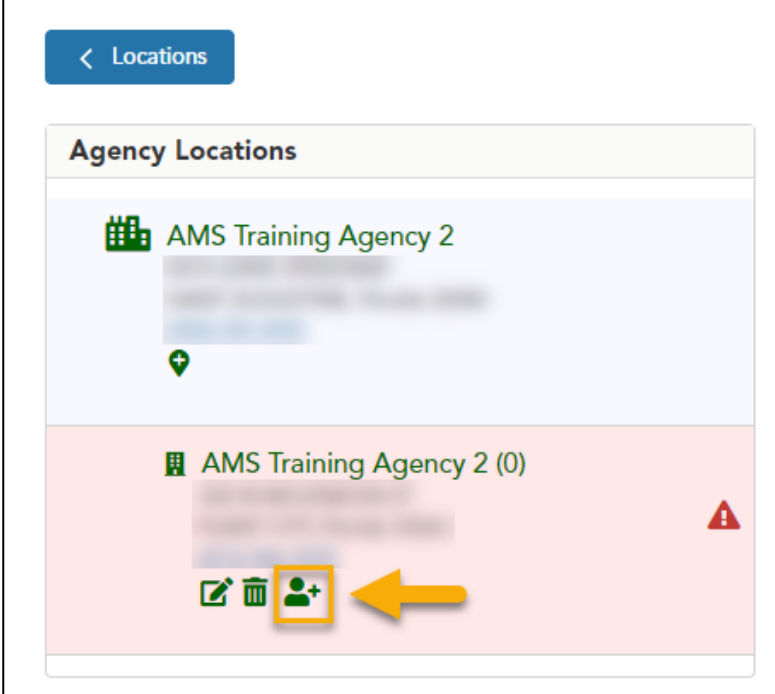
Supplemental Application: Add Location, continued

Step	Action
3	<p>Complete all required fields.</p> 
4	<p>Select Validate Address.</p>  <p>Result: The address is validated and standardized.</p>
5	<p>To add an additional location, select Add Location. Repeat Step 3 above.</p>  <p>Addresses validated and standardized.</p> <p>Result: The new location appears on the <i>Agency Locations</i> tile.</p>

Continued on next page

Locations Tab, Continued

Supplemental Application: Add Location, continued

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

Continued on next page

Locations Tab, Continued

Supplemental Application: Add Location, continued

Step	Action
7	<p>Complete all applicable fields, then select Add Staff.</p> <div data-bbox="581 478 1390 1199"> </div> <p><i>Note:</i> Refer to Supplemental Application: Add Staff Overview for detailed instructions on adding staff.</p>
8	<p>When you have added necessary staff at the new location, select Submit Request.</p> <div data-bbox="581 1373 1390 1461"> </div> <p>Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>

Continued on next page

Locations Tab, Continued

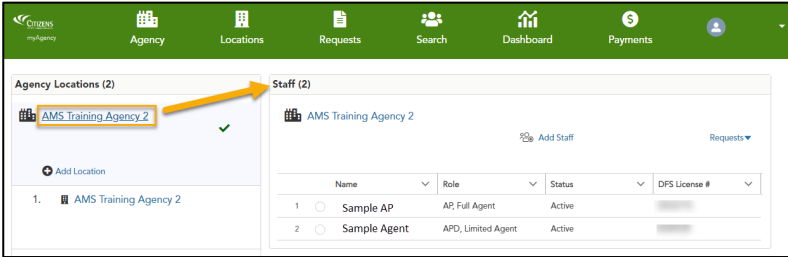
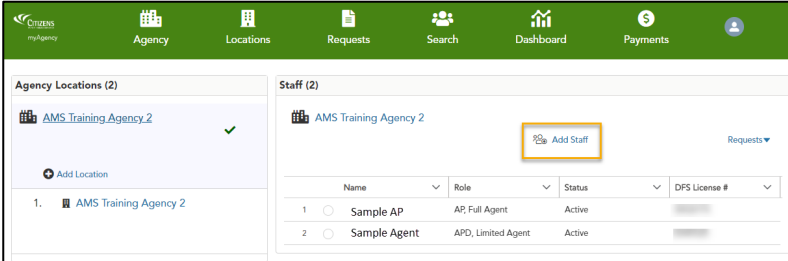
Supplemental Application: Add Staff Overview

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:

Step	Action
1	<p>Access the Add Staff function, either from the <i>Supplemental Application to Add Location</i>, or from the <i>Locations</i> tab.</p> <p>To access from the <i>Locations</i> tab, select an agency location to expand the staff list.</p> 
2	<p>Select Add Staff.</p>  <p>Result: The <i>Supplemental Application</i> to add staff will display.</p>

Continued on next page

Locations Tab, Continued

Supplemental Application: Add Staff Overview, continued

Step	Action												
3	<p>The <i>Supplemental Application</i> screen is dynamic, and additional fields will appear based on the information entered.</p> <div data-bbox="581 516 1404 1270" style="border: 1px solid black; padding: 10px;"> <p>Supplemental Application Submit Request Cancel Request </p> <p>Add Staff</p> <p> AMS Training Agency 2 Active</p> <hr/> <p><input checked="" type="checkbox"/> Does the staff member have a DFS License Number?</p> <p>Personal Information</p> <p>* First Name * Last Name * Social Security Number * Birthdate</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Contact Information</p> <p>* Office Phone Office Phone Extension Mobile Phone <input checked="" type="checkbox"/> Can Receive Text Messages?</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="checkbox"/></p> <p>Fax * Email</p> <p><input type="text"/> <input type="text"/></p> <p>Additional Information</p> <p><input checked="" type="checkbox"/> Is Agency Principal Designee?</p> <p><input checked="" type="checkbox"/> Is Support Staff?</p> <p style="text-align: center;"> Add Staff Clear </p> </div> <p>To add staff, refer to the appropriate section below:</p> <table border="1" data-bbox="581 1339 1404 1684"> <thead> <tr> <th>If adding a:</th> <th>Then see:</th> </tr> </thead> <tbody> <tr> <td>Fully Appointed Agent</td> <td>Add Staff: Fully Appointed Agent</td> </tr> <tr> <td>Limited Agent</td> <td>Add Staff: Limited Agent</td> </tr> <tr> <td>Licensed Customer Representative who writes and services</td> <td>Add Staff: LCR Write and Service</td> </tr> <tr> <td>Licensed Customer Representative who only services</td> <td>Add Staff: LCR Service Only</td> </tr> <tr> <td>Support Staff</td> <td>Add Staff: View-Only Support</td> </tr> </tbody> </table>	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
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

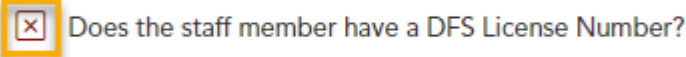
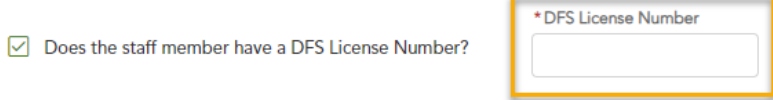
Locations Tab, Continued

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	<p>Select the red X next to the <i>Does the staff member have a DFS License Number?</i></p> <div data-bbox="581 995 1406 1108" style="border: 1px solid black; padding: 5px;">  </div> <p>Result: The red x turns to a green check mark and the <i>DFS License Number</i> field displays.</p>
2	<p>Enter the DFS license number.</p> <div data-bbox="581 1224 1406 1346" style="border: 1px solid black; padding: 5px;">  </div> <p>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.</p>

Continued on next page

Locations Tab, Continued

Add Staff: Fully Appointed Agent, continued

Step	Action
3	<p>Enter other contact information.</p> <div data-bbox="581 478 1409 856"> <p><input checked="" type="checkbox"/> Does the staff member have a DFS License Number? * DFS License Number: <input type="text"/> Appointed License Type: <input type="text" value="0220"/></p> <p>Personal Information</p> <p>* First Name: <input type="text"/> * Last Name: <input type="text"/> * Social Security Number: <input type="text" value="XXX-XX-XXX7"/> * Birthdate: <input type="text"/></p> <p>Contact Information</p> <p>* Office Phone: <input type="text"/> Office Phone Extension: <input type="text"/> Mobile Phone: <input type="text"/> <input checked="" type="checkbox"/> Can Receive Text Messages?</p> <p>Fax: <input type="text"/> * Email: <input type="text"/></p> </div>
4	<p>Indicate if the new agent is the AP designee by selecting the red X.</p> <div data-bbox="581 940 1409 1129"> <p>Additional Information</p> <p><input checked="" type="checkbox"/> Is Agency Principal Designee? <input checked="" type="checkbox"/> Can the staff member write new business?</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> </div> <p>If yes, review and select Confirm.</p> <div data-bbox="581 1199 1409 1470"> <p style="background-color: #4CAF50; color: white; text-align: center; padding: 5px;">Acknowledgement</p> <p>The Agency Principal Designee (APD) has the same access as the Agency Principal (AP) and can request any and all agency information, including submitting appointment applications, terminations, agency changes, commission inquiries, etc.</p> <p style="text-align: center;"><input checked="" type="button" value="Confirm"/> <input type="button" value="Close"/></p> </div>

Continued on next page

Locations Tab, Continued

Add Staff: Fully Appointed Agent, continued

Step	Action
5	<p>Select the red X to indicate that the agent can write new business.</p> <div data-bbox="581 516 1404 699" style="border: 1px solid black; padding: 5px;"> <p>Additional Information</p> <p><input type="checkbox"/> Is Agency Principal Designee?</p> <p><input checked="" type="checkbox"/> Can the staff member write new business?</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> </div> <p>Result: The red X will change to a green check mark. Additional fields will appear.</p>
6	<p>Select the red X to indicate if the new agent will be an agent of record on policies written at the agency.</p> <div data-bbox="581 842 1404 1119" style="border: 1px solid black; padding: 5px;"> <p>Additional Information</p> <p><input type="checkbox"/> Is Agency Principal Designee?</p> <p><input checked="" type="checkbox"/> Can the staff member write new business?</p> <p><input checked="" type="checkbox"/> Will staff member be an Agent of Record on policies written by your agency?</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> <p><small>Please note: If you require prompt handling and are adding both non-licensed staff and licensed staff to an existing location, submit a separate request for non-licensed staff only.</small></p> </div> <p>Result: The red X will change to a green check mark. Lines of authority will appear.</p>
7	<p>Indicate the agent's line of authority by selecting the red X next to the applicable line.</p> <div data-bbox="581 1262 1404 1539" style="border: 1px solid black; padding: 5px;"> <p><input checked="" type="checkbox"/> Will staff member be an Agent of Record on policies written by your agency?</p> <p>Lines of Authority:</p> <p><input checked="" type="checkbox"/> Personal Residential LOA</p> <p><input type="checkbox"/> Commercial Residential LOA</p> <p><input type="checkbox"/> Commercial Non Residential LOA</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> <p><small>Please note: If you require prompt handling and are adding both non-licensed staff and licensed staff to an existing location, submit a separate request for non-licensed staff only.</small></p> </div> <p>Result: The red X will change to a green check mark.</p>

Continued on next page

Locations Tab, Continued

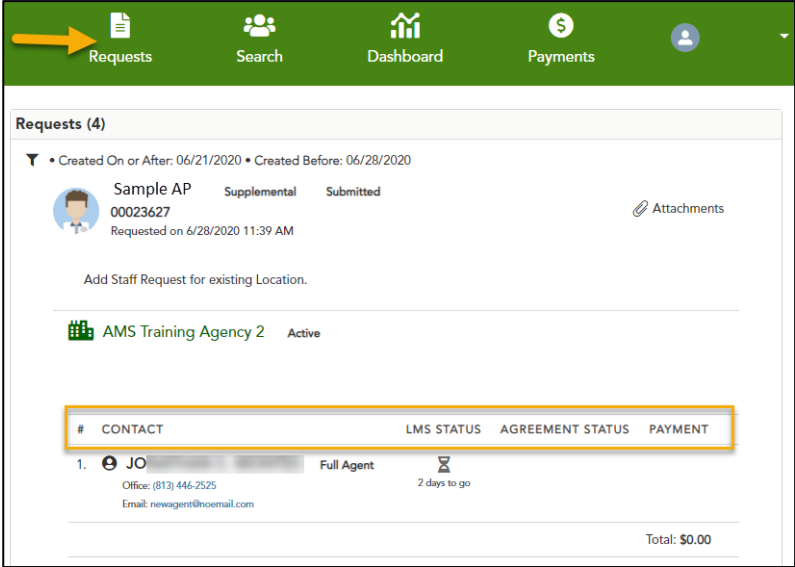
Add Staff: Fully Appointed Agent, continued

Step	Action
8	<p>Select Add Staff.</p> <div data-bbox="594 485 1406 751"> <input checked="" type="checkbox"/> Will staff member be an Agent of Record on policies written by your agency? Lines of Authority: <input checked="" type="checkbox"/> Personal Residential LOA <input checked="" type="checkbox"/> Commercial Residential LOA <input checked="" type="checkbox"/> Commercial Non Residential LOA <input type="button" value="Add Staff"/> <input type="button" value="Clear"/> <small>Please note: If you require prompt handling and are adding both non-licensed staff and licensed staff to an existing location, submit a separate request for non-licensed staff only.</small> </div> <p>Results:</p> <ul style="list-style-type: none"> The agent has been added to the request. A confirmation banner appears. <div data-bbox="584 892 1412 1003"> <p>✔ Contact has been added to the request. Add remaining staff members before submitting the request. ✕</p> </div> <ul style="list-style-type: none"> 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 <i>Supplemental Application</i> by selecting the green Edit Staff icon from the <i>Agency Locations</i> tile. <div data-bbox="581 1251 1412 1461"> </div>
9	<p>Select Submit Request.</p> <div data-bbox="584 1539 1396 1759"> </div> <p>Result: The <i>Supplemental Application</i> has been submitted. A confirmation banner appears.</p>

Continued on next page

Locations Tab, Continued

**Add Staff:
Fully
Appointed
Agent,
continued**

Step	Action
10	<p>The <i>Requests</i> tab will display, with the <i>Supplemental Application</i> request to add staff listed.</p> <p>The newly requested agent's name, LMS, agreement, and payment status will display.</p>  <p>Results and Additional Actions: After a supplemental application is submitted, both full and limited agents must complete the following prior to appointment:</p> <ul style="list-style-type: none"> • 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.

Continued on next page

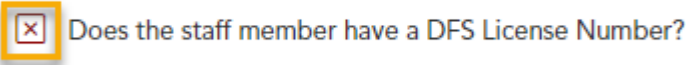
Locations Tab, Continued

Add Staff: Limited agents write new business for a fully appointed agent and **do not**
Limited Agent **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 <i>Does the staff member have a DFS License Number?</i> question. <div style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div> <p>Result: The red X will change to a green check mark and the <i>DFS License Number</i> field displays.</p>

Continued on next page

Locations Tab, Continued

Add Staff: Limited Agent, continued

Step	Action
2	<p>Enter the DFS license number.</p> <div data-bbox="581 485 1404 611"> <input checked="" type="checkbox"/> Does the staff member have a DFS License Number? <div style="border: 2px solid orange; padding: 5px; display: inline-block; margin-left: 20px;"> * DFS License Number <input type="text"/> </div> </div> <p>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.</p>
3	<p>Enter other contact information.</p> <div data-bbox="581 751 1404 1129"> <input checked="" type="checkbox"/> Does the staff member have a DFS License Number? <div style="margin-left: 20px;"> * DFS License Number: <input type="text"/> Appointed License Type: <input type="text" value="0220"/> </div> <p>Personal Information</p> <div style="display: flex; justify-content: space-between;"> <div>* First Name: <input type="text"/></div> <div>* Last Name: <input type="text"/></div> <div>* Social Security Number: <input type="text" value="XXX-XX-XXX7"/></div> <div>* Birthdate: <input type="text"/></div> </div> <p>Contact Information</p> <div style="border: 2px solid orange; padding: 5px; display: flex; justify-content: space-between;"> <div>* Office Phone: <input type="text"/></div> <div>Office Phone Extension: <input type="text"/></div> <div>Mobile Phone: <input type="text"/></div> </div> <div style="margin-top: 5px;"> Fax: <input type="text"/> * Email: <input type="text"/> </div> <div style="text-align: right; margin-top: 5px;"> <input checked="" type="checkbox"/> Can Receive Text Messages? </div> </div>
4	<p>Indicate if the agent is the agency principal designee by selecting the red X.</p> <div data-bbox="581 1213 1404 1392"> <p>Additional Information</p> <div style="border: 1px solid gray; padding: 5px;"> <input checked="" style="border: 2px solid orange;" type="checkbox"/> Is Agency Principal Designee? </div> <input checked="" type="checkbox"/> Can the staff member write new business? <div style="margin-top: 10px;"> <input type="button" value="Add Staff"/> <input type="button" value="Clear"/> </div> </div> <p>If yes, review and select Confirm.</p> <div data-bbox="581 1465 1404 1736" style="background-color: #4CAF50; color: white; padding: 10px; text-align: center;"> <p>Acknowledgement</p> <p>The Agency Principal Designee (APD) has the same access as the Agency Principal (AP) and can request any and all agency information, including submitting appointment applications, terminations, agency changes, commission inquiries, etc.</p> <div style="display: flex; justify-content: center; margin-top: 10px;"> <div style="border: 2px solid orange; padding: 5px; margin-right: 10px;"> <input type="button" value="Confirm"/> </div> <input type="button" value="Close"/> </div> </div>

Continued on next page

Locations Tab, Continued




Add Staff: Limited Agent, continued

Step	Action
5	<p>Select the red X to indicate that the limited agent can write new business on behalf of a fully appointed agent.</p> <div data-bbox="581 516 1412 701" style="border: 1px solid black; padding: 5px;"> <p>Additional Information</p> <p><input type="checkbox"/> Is Agency Principal Designee?</p> <p><input type="checkbox"/> Can the staff member write new business?</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> </div> <p>Result: The red X will change to a green check. Additional fields will appear.</p>
6	<p>Important: To request appointment for a limited agent, do not select <i>Will staff member be an Agent of Record on policies written by your agency?</i></p> <div data-bbox="581 873 1412 1150" style="border: 1px solid black; padding: 5px;"> <p>Additional Information</p> <p><input type="checkbox"/> Is Agency Principal Designee?</p> <p><input checked="" type="checkbox"/> Can the staff member write new business?</p> <p><input type="checkbox"/> Will staff member be an Agent of Record on policies written by your agency?</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> <p><small>Please note: If you require prompt handling and are adding both non-licensed staff and licensed staff to an existing location, submit a separate request for non-licensed staff only.</small></p> </div>

Continued on next page

Locations Tab, Continued

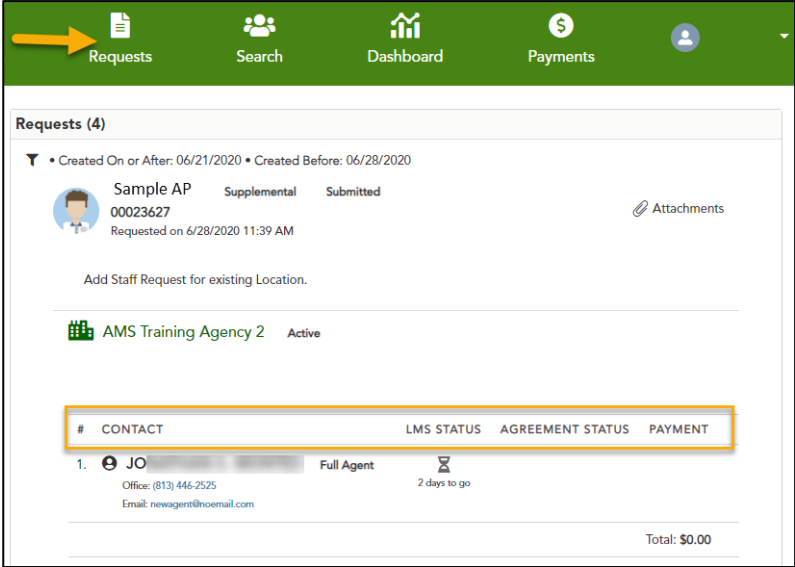
Add Staff: Limited Agent, continued

Step	Action
7	<p>Select Add Staff.</p> <div data-bbox="581 485 1414 758"> <p>Additional Information</p> <p><input checked="" type="checkbox"/> Is Agency Principal Designee?</p> <p><input checked="" type="checkbox"/> Can the staff member write new business?</p> <p><input checked="" type="checkbox"/> Will staff member be an Agent of Record on policies written by your agency?</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> <p><small>Please note: If you require prompt handling and are adding both non-licensed staff and licensed staff to an existing location, submit a separate request for non-licensed staff only.</small></p> </div> <p>Results:</p> <ul style="list-style-type: none"> The agent has been added to the request. A confirmation banner appears. <div data-bbox="581 869 1414 982"> <p> Contact has been added to the request. Add remaining staff members before submitting the request. </p> </div> <ul style="list-style-type: none"> 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 <i>Supplemental Application</i> by selecting the green Edit Staff icon from the <i>Agency Locations</i> tile.
8	<p>Select Submit Request.</p> <div data-bbox="581 1304 1414 1524"> <p>Supplemental Application <input type="button" value="Submit Request"/> <input type="button" value="Cancel Request"/></p> <p>Add Staff</p> <p> AMS Training Agency 2 Active</p> </div> <p>Result: The <i>Supplemental Application</i> has been submitted. A confirmation banner appears.</p>

Continued on next page

Locations Tab, Continued

**Add Staff:
Limited
Agent,**
continued

Step	Action
9	<p>The <i>Requests</i> tab will display, with the <i>Supplemental Application</i> request listed.</p> <p>The new agent's name, LMS, agreement, and payment status will display.</p>  <p>Results and Additional Actions: After a supplemental application is submitted, both full and limited agents must complete the following prior to appointment:</p> <ul style="list-style-type: none"> • 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

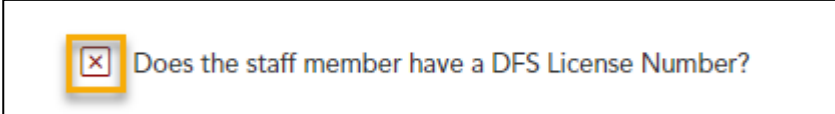
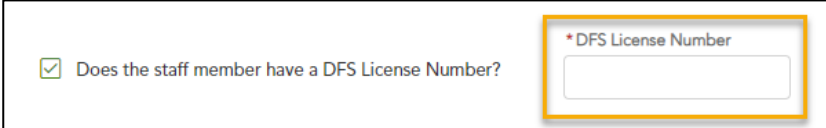
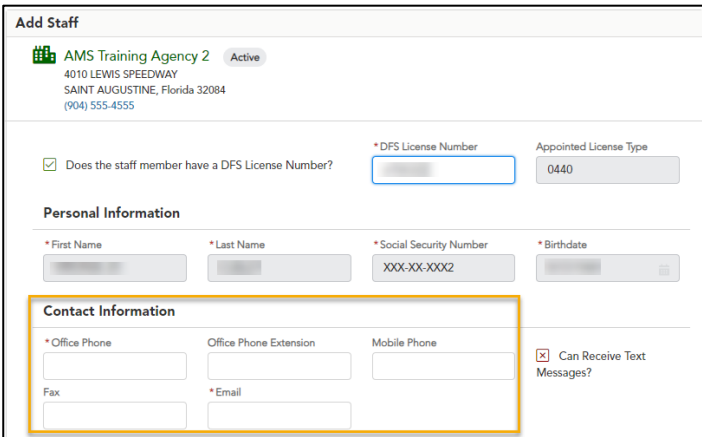
Add Staff: LCR Write and Service

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	<p>Select the red X next to the <i>Does the staff member have a DFS License Number?</i> question.</p>  <p>Result: The red x turns to a green check mark and the <i>DFS License Number</i> field displays.</p>
2	<p>Enter the DFS license number.</p>  <p>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.</p>
3	<p>Enter other contact information.</p> 

Continued on next page

Locations Tab, Continued

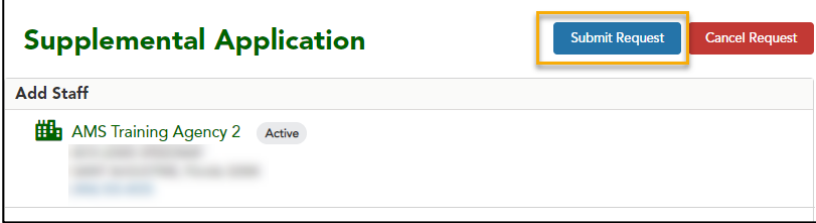
Add Staff: LCR Write and Service, continued

Step	Action
4	<p>Important: To add an LCR who can write new business under an appointed agent, select the red X next to <i>Can the staff member write new business?</i></p> <div data-bbox="581 548 1404 716" style="border: 1px solid black; padding: 5px;"> <p>Additional Information</p> <p><input type="checkbox"/> Is Agency Principal Designee?</p> <p><input checked="" type="checkbox"/> Can the staff member write new business?</p> <p><input type="checkbox"/> Can the staff member service all locations?</p> </div> <p>Result: The red X changes to a green check mark and the option for <i>Can the staff member service all locations?</i> disappears.</p>
5	<p>Select Add Staff.</p> <div data-bbox="581 856 1404 1129" style="border: 1px solid black; padding: 5px;"> <p><input checked="" type="checkbox"/> Will staff member be an Agent of Record on policies written by your agency?</p> <p>Lines of Authority:</p> <p><input checked="" type="checkbox"/> Personal Residential LOA</p> <p><input type="checkbox"/> Commercial Residential LOA</p> <p><input type="checkbox"/> Commercial Non Residential LOA</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> <p><small>Please note: If you require prompt handling and are adding both non-licensed staff and licensed staff to an existing location, submit a separate request for non-licensed staff only.</small></p> </div> <p>Results:</p> <ul style="list-style-type: none"> The LCR has been added to the request. A confirmation banner appears. <div data-bbox="581 1234 1404 1350" style="border: 1px solid black; background-color: #f08080; padding: 5px; text-align: center;"> <p><input checked="" type="checkbox"/> Contact has been added to the request. <input type="checkbox"/></p> <p>Add remaining staff members before submitting the request.</p> </div> <ul style="list-style-type: none"> 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 <i>Supplemental Application</i> by selecting Edit Staff from the <i>Agency Locations</i> tile. <div data-bbox="581 1591 1404 1803" style="border: 1px solid black; padding: 5px;"> <p>Supplemental Application <input type="button" value="Submit Request"/> <input type="button" value="Cancel Request"/></p> <div style="display: flex;"> <div style="flex: 1; border: 1px solid gray; padding: 2px;"> <p>Agency Locations</p> <p>AMS Training Agency 2 (1)</p> <p>1) Full Agent <input checked="" type="checkbox"/> <input type="button" value="Edit Staff"/></p> </div> <div style="flex: 1; border: 1px solid gray; padding: 2px;"> <p>Add Staff</p> <p>AMS Training Agency 2 Active</p> <p><input checked="" type="checkbox"/> Does the staff member have a DFS License Number?</p> <p>Personal Information</p> </div> </div> </div>

Continued on next page

Locations Tab, Continued

**Add Staff:
LCR Write
and Service,**
continued

Step	Action
6	<p>Select Submit Request.</p>  <p>Result: The Supplemental Application has been submitted. A confirmation banner appears.</p>
7	<p>The <i>Requests</i> tab will display, with the <i>Supplemental Application</i> 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.</p>

Continued on next page

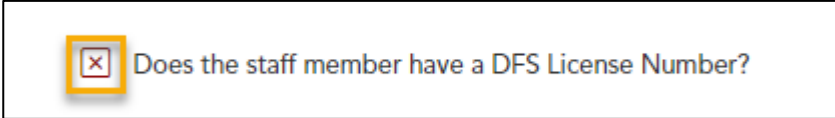
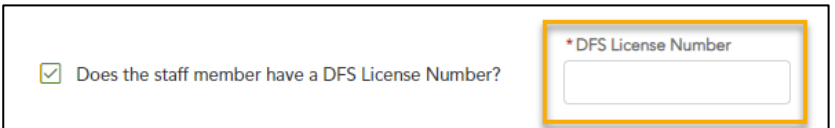
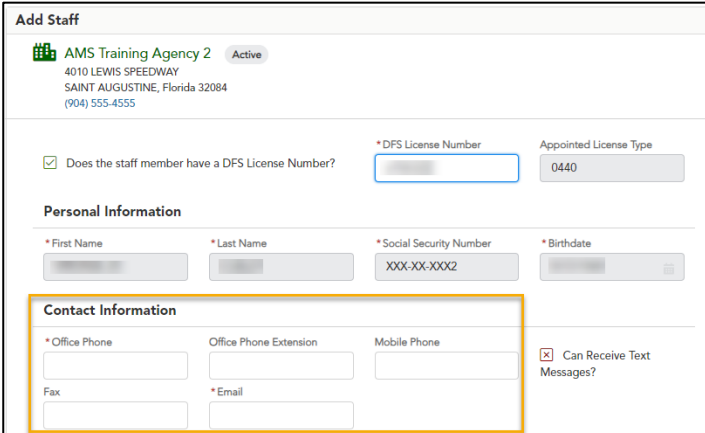
Locations Tab, Continued

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* file.

Step	Action
1	<p>Select the red X next to the <i>Does the staff member have a DFS License Number?</i> question.</p>  <p>Result: The red x turns to a green check mark <i>DFS License Number</i> field displays.</p>
2	<p>Enter the DFS license number.</p>  <p>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.</p>
3	<p>Enter other contact information.</p> 

Continued on next page

Locations Tab, Continued

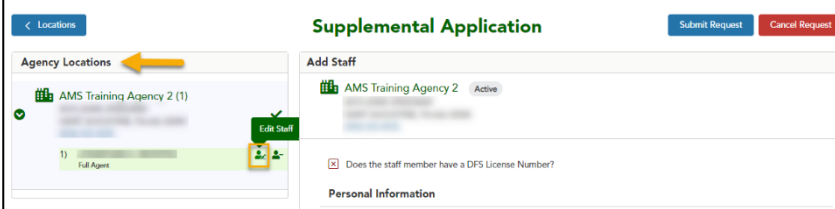
Add Staff:
Service-Only
LCR,
continued

Step	Action
4	<p>Select the red X next to <i>Can the staff member service all locations?</i></p> <div data-bbox="581 516 1396 743" style="border: 1px solid black; padding: 5px;"> <p>Additional Information</p> <p><input checked="" type="checkbox"/> Is Agency Principal Designee?</p> <p><input checked="" type="checkbox"/> Can the staff member write new business?</p> <p><input checked="" type="checkbox"/> Can the staff member service all locations?</p> <p><input type="button" value="Add Staff"/> <input type="button" value="Clear"/></p> </div>

Continued on next page

Locations Tab, Continued

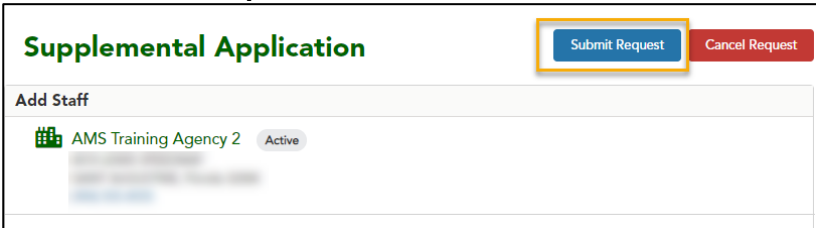
Add Staff: Service-Only LCR, continued

Step	Action
5	<p data-bbox="581 449 808 480">Select Add Staff.</p> <div data-bbox="581 485 1370 674"> <p data-bbox="597 506 781 527">Additional Information</p> <p data-bbox="597 552 812 573"><input checked="" type="checkbox"/> Is Agency Principal Designee?</p> <p data-bbox="597 583 886 604"><input checked="" type="checkbox"/> Can the staff member service all locations?</p> <p data-bbox="597 615 699 653">Add Staff</p> <p data-bbox="708 615 776 653">Clear</p> </div> <p data-bbox="581 716 695 747">Results:</p> <ul data-bbox="630 751 1382 814" style="list-style-type: none"> The Service-Only LCR has been added to the request. A confirmation banner appears. <div data-bbox="581 821 1412 932"> <p data-bbox="630 842 1300 905"> ✓ Contact has been added to the request. Add remaining staff members before submitting the request. ✕ </p> </div> <ul data-bbox="630 978 1373 1178" style="list-style-type: none"> 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 <i>Supplemental Application</i> by selecting Edit Staff from the <i>Agency Locations</i> tile. <div data-bbox="581 1182 1412 1388">  <p>The screenshot shows the 'Supplemental Application' page. On the left, under 'Agency Locations', there is a list with 'AMS Training Agency 2 (1)' and an 'Edit Staff' button highlighted with a green box and an arrow. On the right, under 'Add Staff', there is a form for 'AMS Training Agency 2' with a 'Does the staff member have a DFS License Number?' checkbox checked. Buttons for 'Submit Request' and 'Cancel Request' are visible at the top right.</p> </div>

Continued on next page

Locations Tab, Continued

Add Staff:
Service-Only
LCR,
continued

Step	Action
6	<p>Select Submit Request.</p>  <p>Result: The Supplemental Application has been submitted. A confirmation banner appears.</p>
7	<p>The <i>Requests</i> tab will display, with the <i>Supplemental Application</i> 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.</p>

Continued on next page

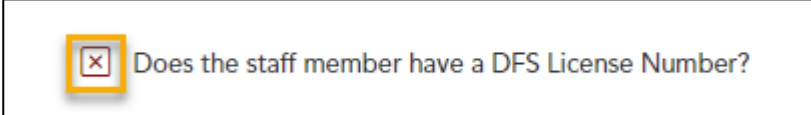
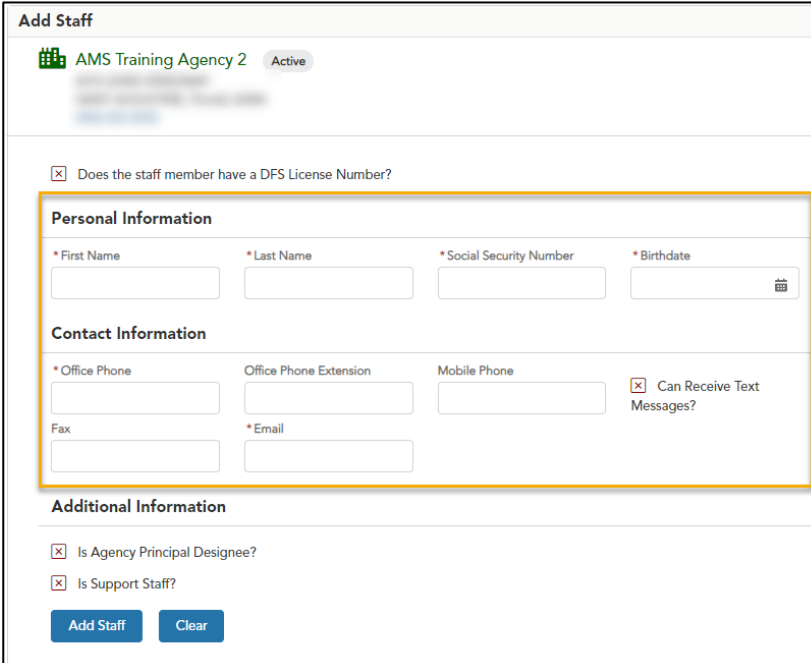
Locations Tab, Continued

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.



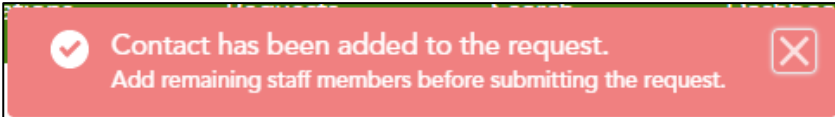
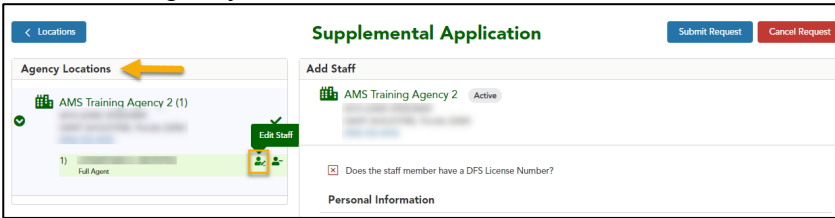
After accessing the [Supplemental Application Add Staff](#) screen, add view-only support staff following the steps below:

Step	Action
1	<p>Important: Do not select the red X next to the <i>Does the staff member have a DFS License Number?</i> question.</p> 
2	<p>Enter personal and contact information.</p> 

Continued on next page

Locations Tab, Continued

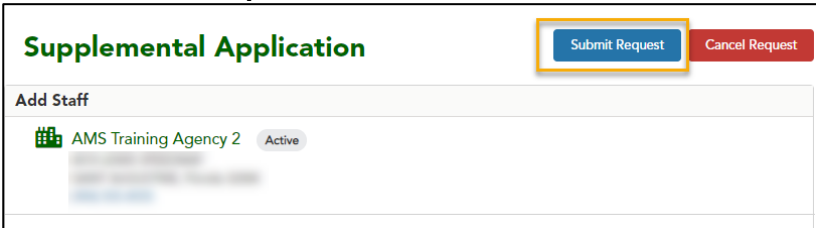
Add Staff: View-Only Support, continued

Step	Action
3	<p>Select the red X next to <i>Is Support Staff?</i></p> 
4	<p>Select Add Staff.</p>  <p>Results:</p> <ul style="list-style-type: none"> The newly added support staff has been added to the request. A confirmation banner appears.  <ul style="list-style-type: none"> 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 <i>Supplemental Application</i> by selecting Edit Staff from the <i>Agency Locations</i> tile. 

Continued on next page

Locations Tab, Continued

**Add Staff:
View-Only
Support,
continued**

Step	Action
5	<p>Select Submit Request.</p>  <p>Result: The Supplemental Application has been submitted. A confirmation banner appears.</p>
6	<p>The <i>Requests</i> 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.</p>

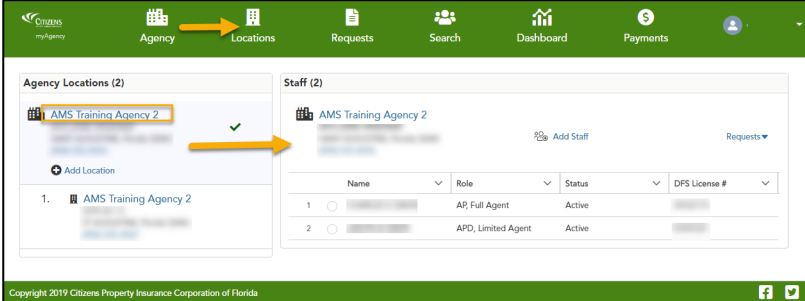
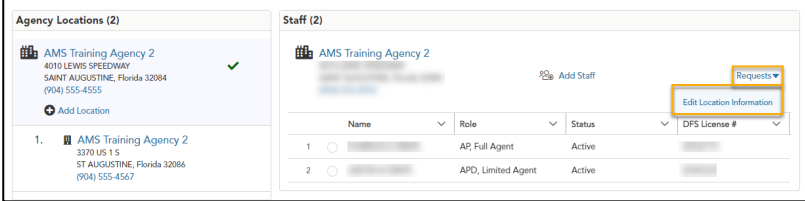
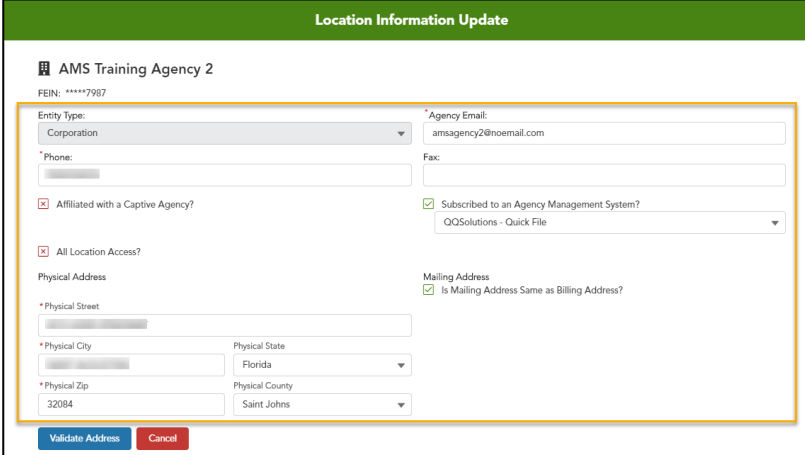
Continued on next page

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*.

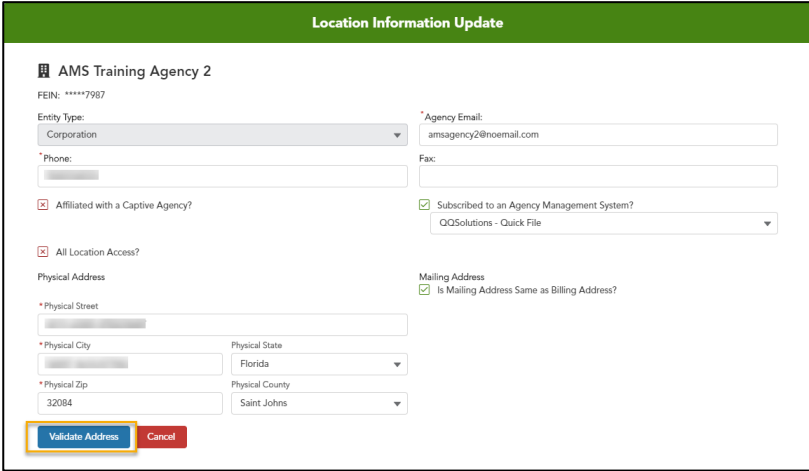
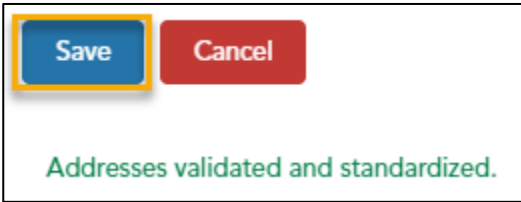
To submit the *Edit Agency Location Information* request:

Step	Action
1	<p>Access the <i>Locations</i> tab, then expand the location that requires updating by selecting the blue hyperlink.</p>  <p>Result: That location's <i>Staff</i> tile expands.</p>
2	<p>Select the Requests drop-down menu, then select Edit Location Information.</p>  <p>Result: The <i>Location Information Update</i> screen displays.</p>
3	<p>Make updates as necessary.</p> 

Continued on next page

Locations Tab, Continued

Request: Edit Agency Location Information, continued

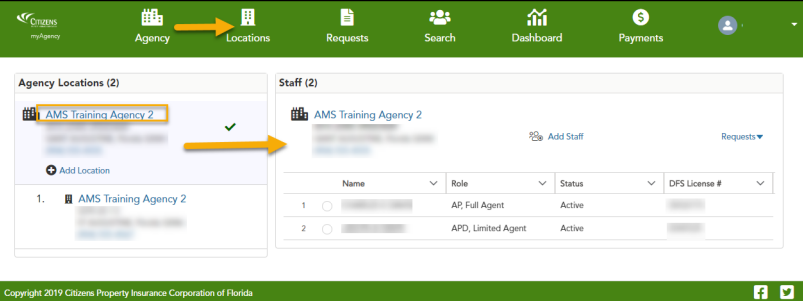
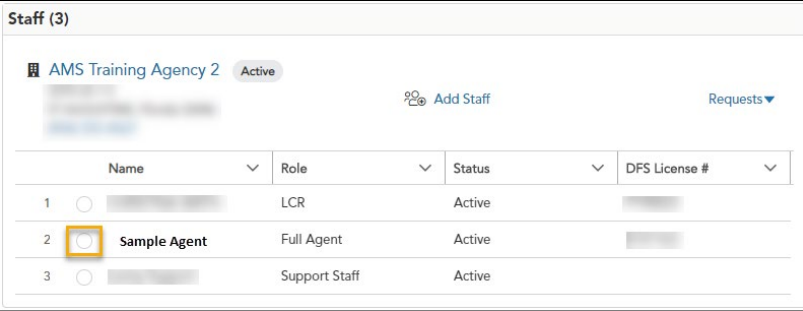
Step	Action
4	<p data-bbox="581 449 914 480">Select <u>Validate Address</u>.</p> <div data-bbox="581 480 1386 947">  </div> <p data-bbox="581 953 1187 984">Result: Address is validated and standardized.</p>
5	<p data-bbox="581 989 748 1020">Select <u>Save</u>.</p> <div data-bbox="581 1020 1099 1220">  </div> <p data-bbox="581 1226 1404 1285">Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>

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*.

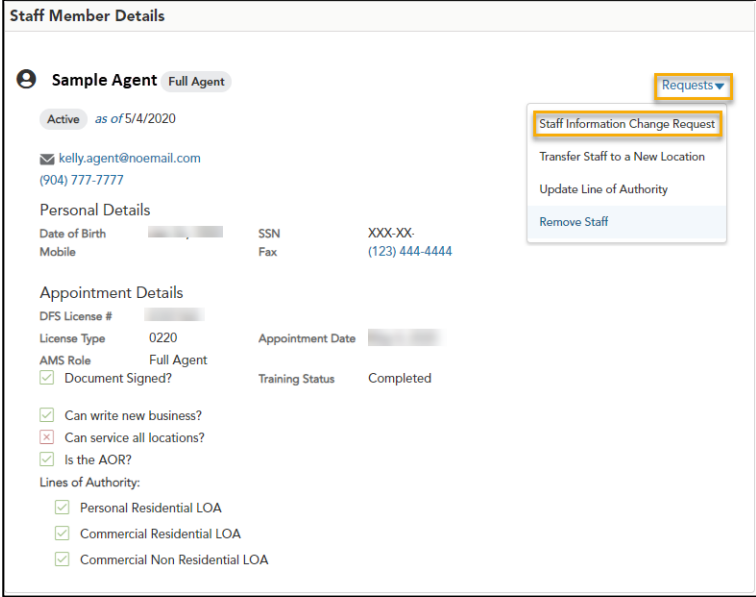
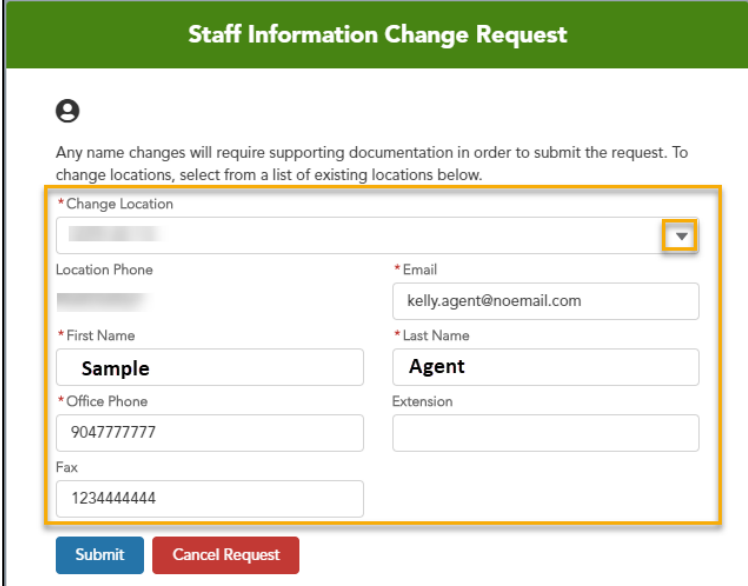
To update staff information:

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

Continued on next page

Locations Tab, Continued



Request: Staff Information Change, continued

Step	Action
3	<p>Select the Requests drop-down menu, then Staff Information Change Request.</p>  <p>Result: The <i>Staff Information Change Request</i> screen displays.</p>
4	<p>Complete necessary edits.</p> 

Continued on next page

Locations Tab, Continued

Request: Staff Information Change, continued

Step	Action
5	<p>Select Submit.</p> <div data-bbox="581 478 1367 1108" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #4CAF50; color: white; text-align: center; padding: 5px;">Staff Information Change Request</div> <div style="margin-top: 10px;">  <p>Any name changes will require supporting documentation in order to submit the request. To change locations, select from a list of existing locations below.</p> <p>* Change Location <input type="text" value=""/> </p> <p>Location Phone <input type="text" value=""/></p> <p>* Email <input type="text" value="kelly.agent@noemail.com"/></p> <p>* First Name <input type="text" value="Sample"/></p> <p>* Last Name <input type="text" value="Agent"/></p> <p>* Office Phone <input type="text" value="9047777777"/></p> <p>Extension <input type="text" value=""/></p> <p>Fax <input type="text" value="1234444444"/></p> <p style="text-align: center;"> <input type="button" value="Submit"/> <input type="button" value="Cancel Request"/> </p> </div> </div> <p>Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>

Continued on next page

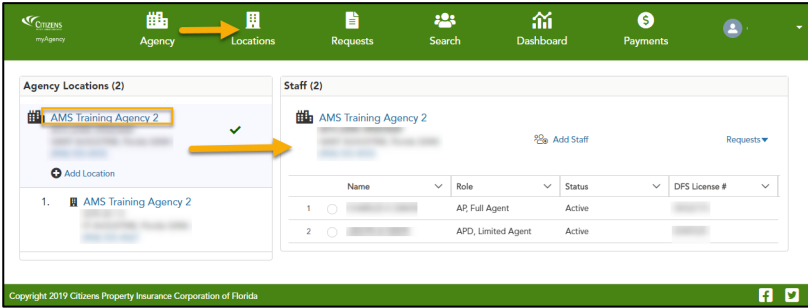
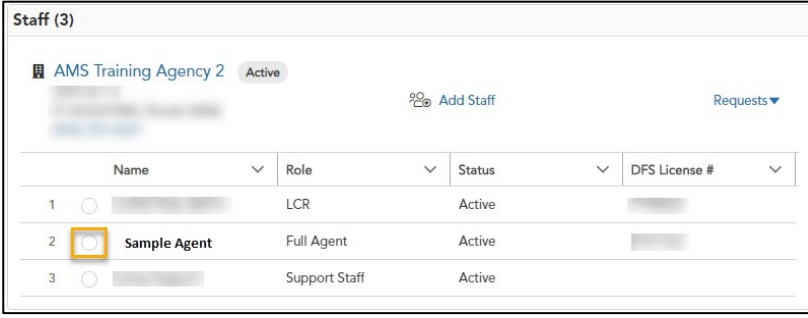
Locations Tab, Continued

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

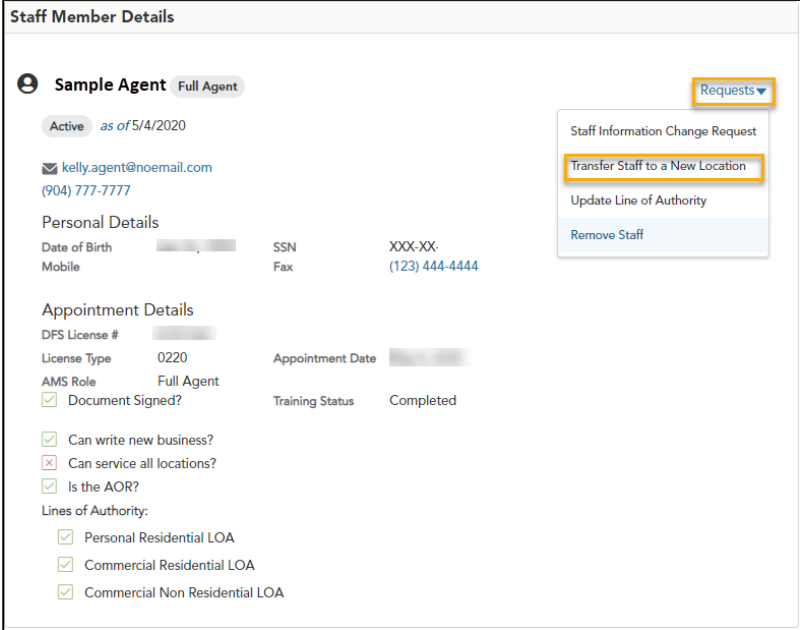
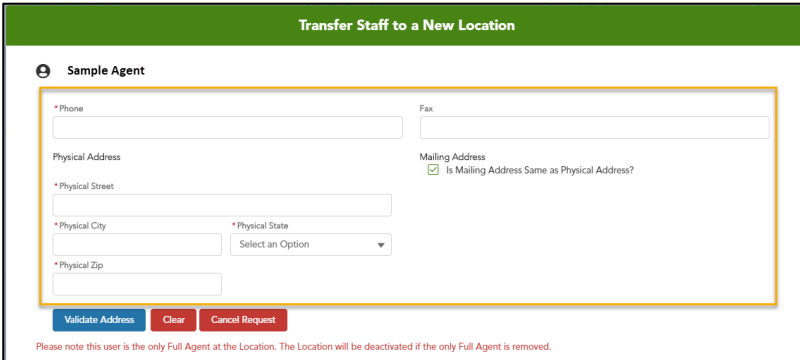
To request staff transferred to a new location:

Step	Action
1	<p>Access the <i>Locations</i> tab, then select the location's hyperlink from where you're transferring staff.</p>  <p>Result: That location's <i>Staff</i> tile expands.</p>
2	<p>Select the radio button next to the staff that requires transferring.</p>  <p>Result: The <i>Staff Member Details</i> screen displays.</p>

Continued on next page

Locations Tab, Continued


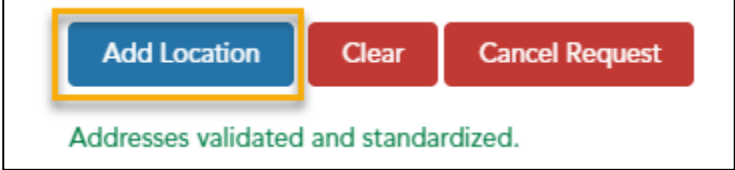
**Request:
Transfer Staff
to a New
Location,**
continued

Step	Action
3	<p>Select the Requests drop-down menu, then Transfer Staff to New Location.</p>  <p>The screenshot shows the 'Staff Member Details' page for 'Sample Agent'. A 'Requests' dropdown menu is open, showing options: 'Staff Information Change Request', 'Transfer Staff to a New Location' (highlighted), 'Update Line of Authority', and 'Remove Staff'. The agent's details include contact information, personal details (Date of Birth, SSN, Mobile, Fax), appointment details (DFS License #, License Type, AMS Role, Training Status), and various checkboxes for permissions and authority.</p>
4	<p>Result: The <i>Transfer Staff to a New Location</i> screen displays.</p> <p>Complete required fields.</p>  <p>The screenshot shows the 'Transfer Staff to a New Location' form. Required fields are highlighted with a yellow border: Phone, Fax, Physical Street, Physical City, Physical State, and Physical Zip. There are also buttons for 'Validate Address', 'Clear', and 'Cancel Request'.</p>

Continued on next page

Locations Tab, Continued

Request:
Transfer Staff
to a New
Location,
continued

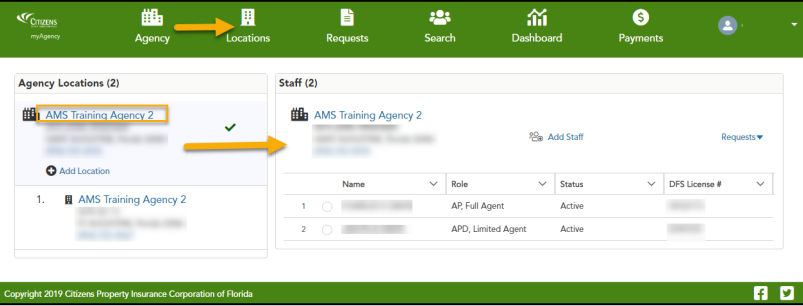
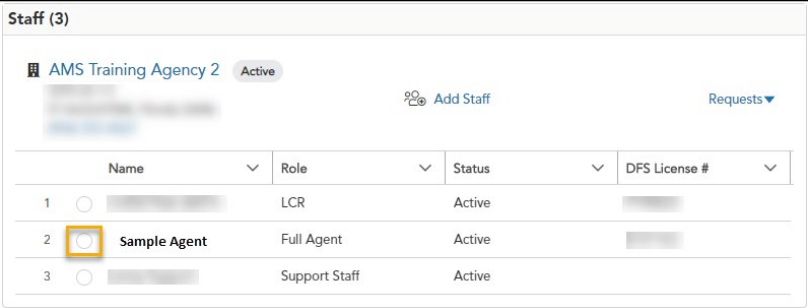
Step	Action
5	Select Validate Address .  Result: Address is validated and standardized.
6	Select Add Location .  Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.

Continued on next page

Locations Tab, Continued

Request: Update Line of Authority

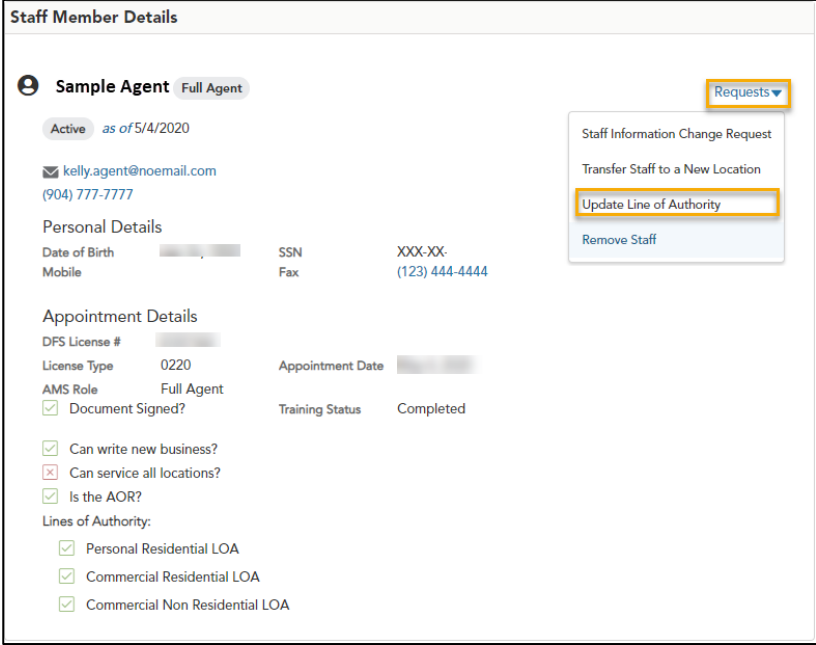
You can request to updates the line(s) of authority for fully appointed and limited agents by following the steps below.

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

Continued on next page

Locations Tab, Continued



Request:
Update Line of Authority,
continued

Step	Action
3	<p>Select the Requests drop-down menu, then Update Line of Authority.</p> <div data-bbox="581 516 1393 1157" style="border: 1px solid black; padding: 10px;"> <p>Staff Member Details</p> <p>Sample Agent Full Agent</p> <p>Active as of 5/4/2020</p> <p>✉ kelly.agent@noemail.com (904) 777-7777</p> <p>Personal Details</p> <p>Date of Birth [redacted] SSN XXX-XX-[redacted] Mobile [redacted] Fax (123) 444-4444</p> <p>Appointment Details</p> <p>DFS License # [redacted]</p> <p>License Type 0220 Appointment Date [redacted]</p> <p>AMS Role Full Agent</p> <p><input checked="" type="checkbox"/> Document Signed? Training Status Completed</p> <p><input checked="" type="checkbox"/> Can write new business? <input checked="" type="checkbox"/> Can service all locations? <input checked="" type="checkbox"/> Is the AOR?</p> <p>Lines of Authority:</p> <p><input checked="" type="checkbox"/> Personal Residential LOA <input checked="" type="checkbox"/> Commercial Residential LOA <input checked="" type="checkbox"/> Commercial Non Residential LOA</p> </div>  <p>Result: The <i>Update Line of Authority</i> screen displays.</p>

Continued on next page

Locations Tab, Continued

Request:
Update Line
of Authority,
continued

Step	Action
4	<p>A green check mark indicates the agent's current line of authority.</p> <ul style="list-style-type: none"> To add an additional line, select the red X. <div data-bbox="581 548 1409 1146" style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center; background-color: #4CAF50; color: white; padding: 5px;">Update Line of Authority</p> <p> Sample Agent</p> <p>Lines of Authority can be selected or deselected based on the agent's eligibility.</p> <p>DFS License # License Type 0220 Lines of Authority</p> <p><input checked="" type="checkbox"/> Personal Residential <input type="checkbox"/> Commercial Residential <input type="checkbox"/> Commercial Non-Residential</p> <p>Additional Details <input style="width: 100%; height: 20px;" type="text"/></p> <p><input type="button" value="Submit"/> <input type="button" value="Cancel Request"/></p> </div> <ul style="list-style-type: none"> To remove a line of authority, select the green check mark. <div data-bbox="581 1220 1409 1814" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; background-color: #4CAF50; color: white; padding: 5px;">Update Line of Authority</p> <p> Sample Agent</p> <p>Lines of Authority can be selected or deselected based on the agent's eligibility.</p> <p>DFS License # License Type 0220 Lines of Authority</p> <p><input checked="" type="checkbox"/> Personal Residential <input type="checkbox"/> Commercial Residential <input type="checkbox"/> Commercial Non-Residential</p> <p>Additional Details <input style="width: 100%; height: 20px;" type="text"/></p> <p><input type="button" value="Submit"/> <input type="button" value="Cancel Request"/></p> </div>

Continued on next page

Locations Tab, Continued

Request:
Update Line
of Authority,
continued

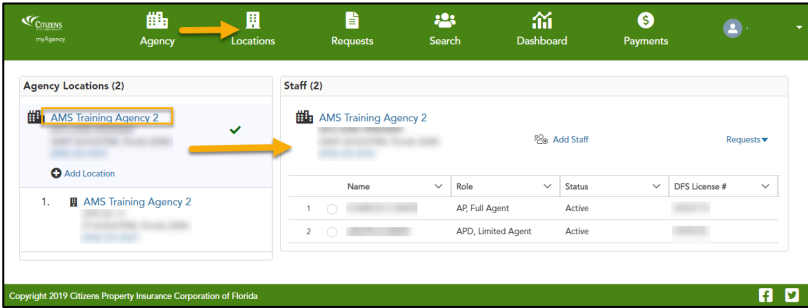
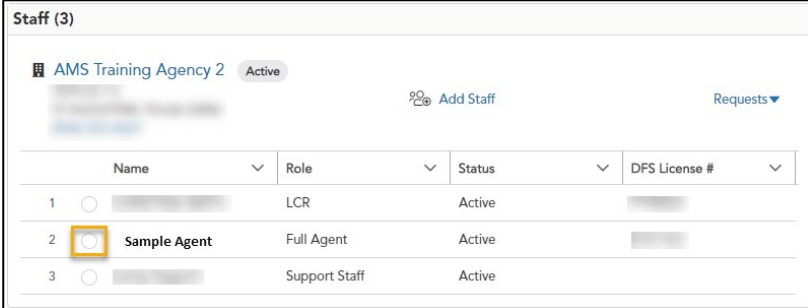
Step	Action
5	<p data-bbox="581 449 1187 480">Add any additional details, then select Submit.</p> <div data-bbox="581 480 1398 1073" style="border: 1px solid black; padding: 10px;"> <div data-bbox="586 485 1393 558" style="background-color: #4CAF50; color: white; text-align: center; padding: 5px;">Update Line of Authority</div> <div data-bbox="639 590 672 621" style="float: left; margin-right: 10px;"></div> <div data-bbox="704 590 850 621">Sample Agent</div> <p data-bbox="639 638 1243 663">Lines of Authority can be selected or deselected based on the agent's eligibility.</p> <p data-bbox="639 680 748 701">DFS License #</p> <p data-bbox="639 705 846 726">License Type 0220</p> <p data-bbox="639 730 773 751">Lines of Authority</p> <ul style="list-style-type: none"> <li data-bbox="656 768 842 789"><input checked="" type="checkbox"/> Personal Residential <li data-bbox="656 810 867 831"><input type="checkbox"/> Commercial Residential <li data-bbox="656 852 906 873"><input type="checkbox"/> Commercial Non-Residential <div data-bbox="639 890 1349 995" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p data-bbox="639 890 773 911">Additional Details</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> </div> <div data-bbox="639 1010 906 1052" style="margin-top: 10px;"> Submit Cancel Request </div> </div> <p data-bbox="581 1079 1398 1140">Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.</p>

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	<p>Access the <i>Locations</i> tab, then select the blue hyperlink to expand the staff location.</p>  <p>Result: That location's <i>Staff</i> tile expands.</p>
2	<p>Select the radio button next to the staff that requires removal.</p>  <p>Result: The <i>Staff Member Details</i> screen displays.</p>

Continued on next page

Locations Tab, Continued

Request:
Remove Staff,
continued

Step	Action
3	<p>Select the Requests drop-down menu, then Remove Staff.</p> <div data-bbox="581 478 1393 1123" style="border: 1px solid black; padding: 5px;"> <p>Staff Member Details</p> <p>Sample Agent Full Agent Requests ▾</p> <p>Active as of 5/4/2020</p> <p>✉ kelly.agent@noemail.com (904) 777-7777</p> <p>Personal Details</p> <p>Date of Birth [redacted] SSN XXX-XX- Mobile [redacted] Fax (123) 444-4444</p> <p>Appointment Details</p> <p>DFS License # [redacted]</p> <p>License Type 0220 Appointment Date [redacted]</p> <p>AMS Role Full Agent</p> <p><input checked="" type="checkbox"/> Document Signed? Training Status Completed</p> <p><input checked="" type="checkbox"/> Can write new business? <input checked="" type="checkbox"/> Can service all locations? <input checked="" type="checkbox"/> Is the AOR?</p> <p>Lines of Authority:</p> <p><input checked="" type="checkbox"/> Personal Residential LOA <input checked="" type="checkbox"/> Commercial Residential LOA <input checked="" type="checkbox"/> Commercial Non Residential LOA</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Staff Information Change Request</p> <p>Transfer Staff to a New Location</p> <p>Update Line of Authority</p> <p>Remove Staff</p> </div> </div> <p>Result: The <i>Remove Staff</i> screen displays.</p>

Continued on next page

Locations Tab, Continued


Request:
Remove Staff,
continued

Step	Action
4	<p>The Remove Staff screen will vary based on role of the staff member being removed:</p> <ul style="list-style-type: none"> 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. <div data-bbox="581 646 1396 1276" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; background-color: #4CAF50; color: white; margin: 0;">Remove Staff</p> <p>↔ Transfer Book of Business</p> <p>The Agent's Book of Business should be transferred to another Agent before deactivation.</p> <p>Agent who you are transferring policies from *Transfer Effective Date</p> <p> <input type="text" value="Sample Agent"/> <input type="text" value=""/> </p> <p>Receiving Agent Information:</p> <p>*Agent receiving policies</p> <p><input type="text" value="Select Agent"/></p> <p> <input type="button" value="Submit"/> <input type="button" value="Cancel Request"/> </p> <p style="color: red; font-size: small;">Please note this user is the only Full Agent at the Location. The Location will be deactivated if the only Full Agent is removed.</p> </div> <ul style="list-style-type: none"> If the staff member being removed does not have a book of business, continue to Step 5. <div data-bbox="581 1354 1396 1711" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; background-color: #4CAF50; color: white; margin: 0;">Remove Staff</p> <p>Support</p> <p>Additional Details</p> <p><input style="width: 100%; height: 40px;" type="text"/></p> <p> <input type="button" value="Submit"/> <input type="button" value="Cancel Request"/> </p> </div>

Continued on next page

Locations Tab, Continued

Request:
Remove Staff,
continued

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

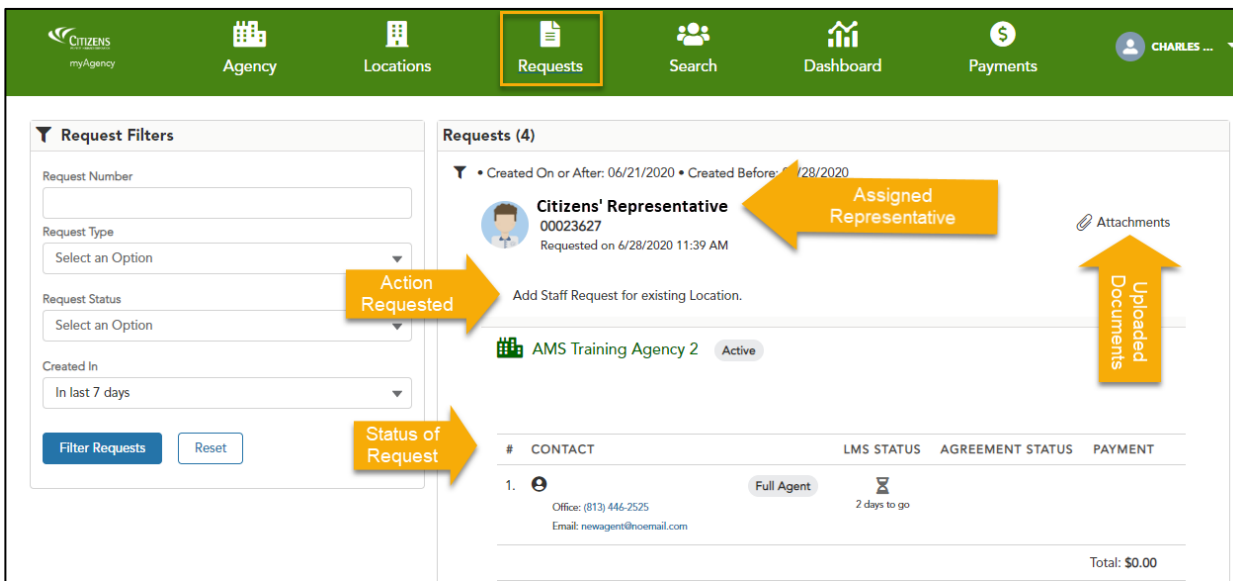
Requests Tab

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



Request Filters

Request Number:

Request Type:

Request Status:


Created In:


Requests (4)

Created On or After: 06/21/2020 • Created Before: 06/28/2020



Citizens' Representative
00023627
Requested on 6/28/2020 11:39 AM

Action Requested: Add Staff Request for existing Location.

Assigned Representative: 

Uploaded Documents: 

Status of Request: AMS Training Agency 2 Active

#	CONTACT	LMS STATUS	AGREEMENT STATUS	PAYMENT
1.	 Office: (813) 446-2525 Email: newagent@hoemail.com	Full Agent	 2 days to go	

Total: \$0.00

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	<p>Select the appropriate Request Filters using the and drop-down menus.</p> <div data-bbox="581 726 1398 1484"> </div>

Continued on next page

Requests Tab, Continued

Filtering Requests, continued

Step	Action
2	<p>Select Filter Requests.</p> <div data-bbox="581 478 1396 1234" style="border: 1px solid #ccc; padding: 10px;"> <p>Request Filters</p> <p>Request Number <input type="text"/></p> <p>Request Type <input type="text" value="Select an Option"/></p> <p>Request Status <input type="text" value="Select an Option"/></p> <p>Created In <input type="text" value="In last 7 days"/></p> <p><input type="button" value="Filter Requests"/> <input type="button" value="Reset"/></p> </div> <p>Result: A list of filtered requests display.</p>

Search Tab

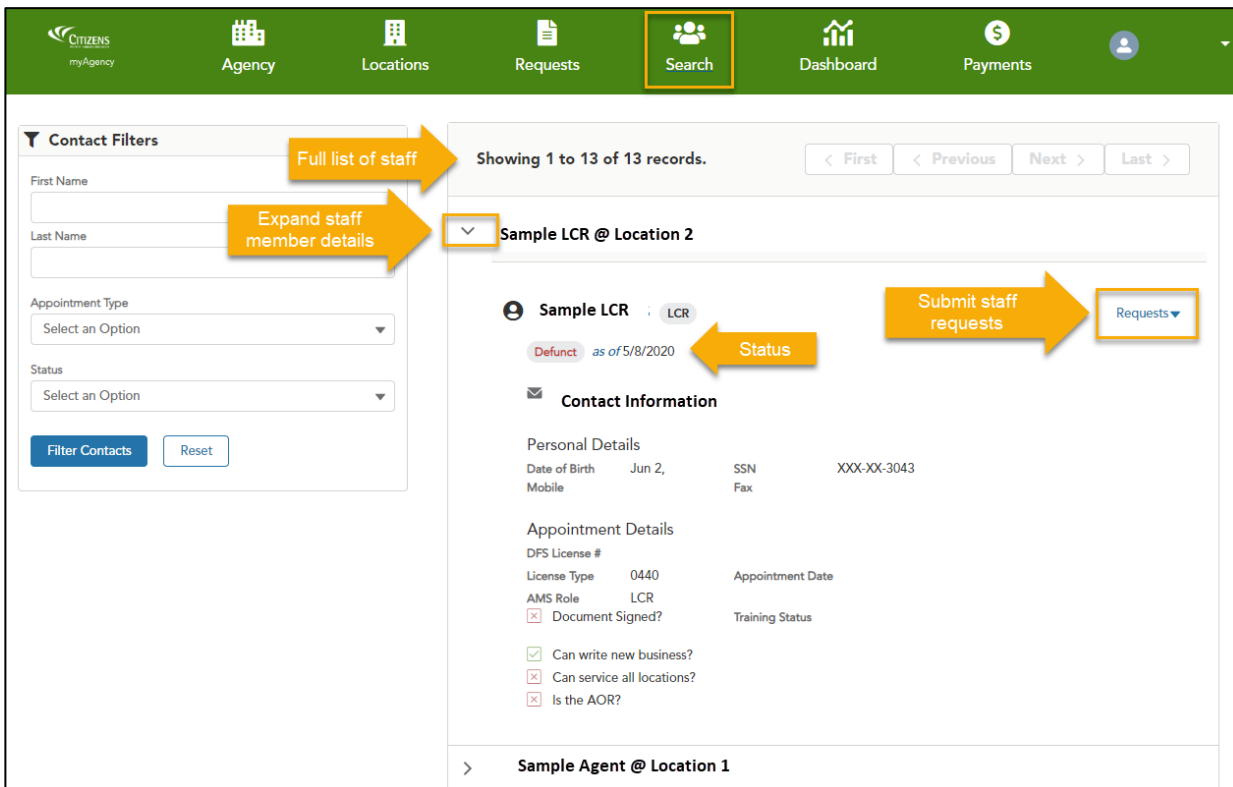
Overview

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	<p>Select the appropriate <i>Contact Filters</i> using the fields and drop-down menus.</p> <div data-bbox="591 705 1382 1451"> <p>Contact Filters</p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Appointment Type Select an Option ▼</p> <p>Status Select an Option ▼</p> <p><input type="button" value="Filter Contacts"/> <input type="button" value="Reset"/></p> </div>

Continued on next page

Search Tab, Continued

Filtering Search Results, continued

Step	Action
2	<p data-bbox="581 449 881 478">Select Filter Contacts.</p> <div data-bbox="591 495 1365 1224" style="border: 1px solid #ccc; padding: 10px;"> <p data-bbox="602 506 870 541">▼ Contact Filters</p> <p data-bbox="613 594 732 621">First Name</p> <input data-bbox="613 627 1341 688" type="text"/> <p data-bbox="613 701 732 728">Last Name</p> <input data-bbox="613 737 1341 798" type="text"/> <p data-bbox="613 835 813 863">Appointment Type</p> <div data-bbox="613 869 1341 930" style="border: 1px solid #ccc; padding: 2px;"> Select an Option ▼ </div> <p data-bbox="613 968 683 995">Status</p> <div data-bbox="613 1001 1341 1062" style="border: 1px solid #ccc; padding: 2px;"> Select an Option ▼ </div> <div data-bbox="602 1094 1008 1192" style="margin-top: 10px;"> <div data-bbox="602 1094 862 1192" style="border: 2px solid orange; padding: 5px; display: inline-block; background-color: #0070c0; color: white; text-decoration: none; border-radius: 4px;">Filter Contacts</div> <div data-bbox="878 1115 1008 1171" style="margin-left: 10px; border: 1px solid #ccc; padding: 5px; display: inline-block; text-decoration: none; border-radius: 4px;">Reset</div> </div> </div> <p data-bbox="581 1236 1352 1295">Result: The list of filtered results display in the staff records list.</p>

Dashboard Tab

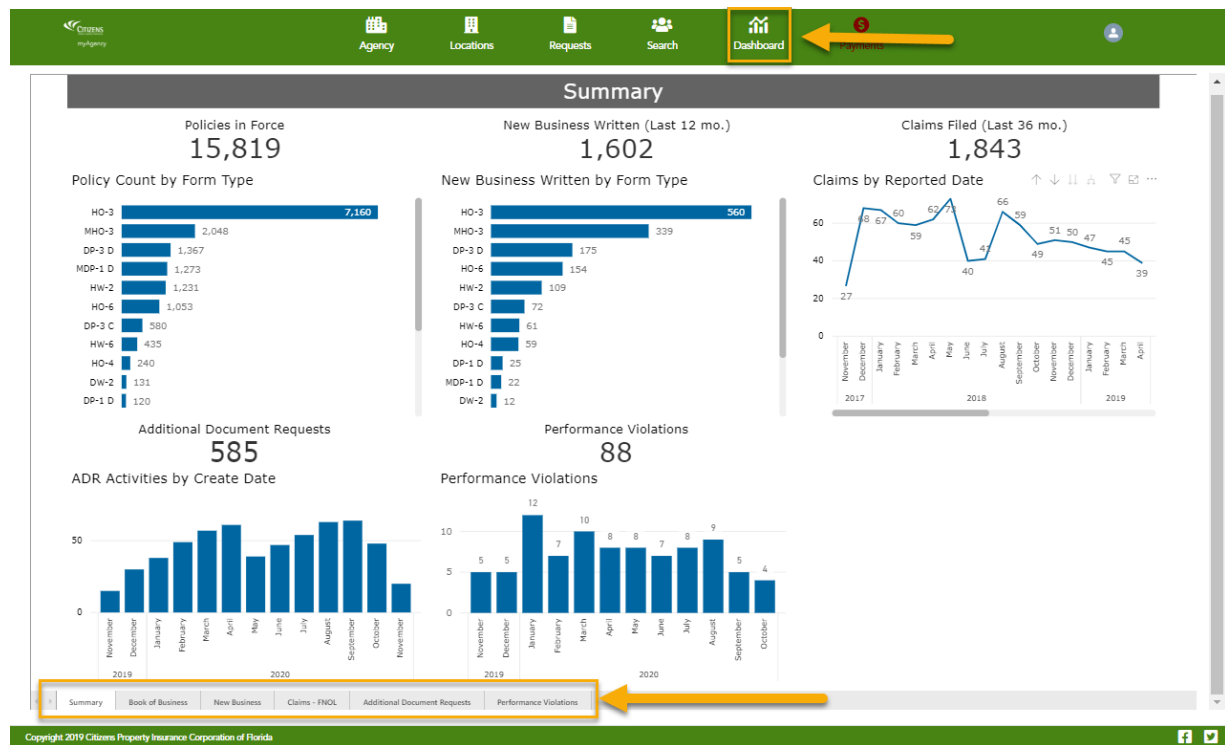
Overview

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:

The screenshot displays the 'New Business' dashboard with the following components:

- Navigation:** Agency, Locations, Requests, Search, **Dashboard** (highlighted), Payments.
- Summary Metrics:**
 - 1. New Business Written (Last 12 mo.): 1,602
 - 2. Total Premium: \$2,295,005
 - 3. Effective Date Range: 10/31/2019 to 10/31/2020
- Charts:**
 - 4. New Business by Form Type by Effective Date Month: A line chart showing monthly trends from October 2019 to October 2020.
 - 5. Policies by Form Type: A horizontal bar chart showing counts for various form types.
- Table:**
 - 6. Policy Details: A table listing individual policies with columns for Agent Name, Policy Number, Form Type, Effective Date, Customer Name, Coverage A, Premium, Customer Home Phone, Customer Email, and Customer Property Address.
- Footer:** Copyright 2019 Citizens Property Insurance Corporation of Florida. Navigation tabs: Summary, Book of Business, **New Business**, Performance Violations.

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
 8. Claim details
- Note:* Metrics will recalculate based on date range selected.

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

Claims Reported

Number of Claims: **1,825**

Indemnity Paid: **\$12,604,622**

Who Reports Claims

Self-Insured	1,397
Relative	21
Insurant	20
Public Adjuster	64
Attorney	37
Agent	23
Property Manager	8

Claims By Reported Date with Indemnity Paid

CAT Event: N Y

Reported Date: 11/4/2017 to 10/31/2020

Policy Details

Claim Number	Policy Number	Date of Loss	Customer Name	Effective Date	Expiration Date	Loss Cause	CAT Indicator	Cause of Loss	Status	Report Date	How Reported	Entirety
519868		5/18/2018		8/13/2018	8/13/2019		N	All Other Physical Damage	CLOSED	3/15/2019		
188505		4/19/2019		9/29/2020	9/29/2021		N	All Other Physical Damage	CLOSED	5/12/2020		
281419		10/9/2019		2/1/2020	2/1/2021		N	Liability - Bodily Injury	CLOSED	12/2/2019		
616521		4/5/2018		11/1/2020	11/1/2021		Y	Loss Assessment	CLOSED	5/23/2018		
163571		12/18/2017		3/3/2020	3/3/2021		N	Water Damage - Non Weather Related	CLOSED	12/19/2017		
903204		11/22/2017		7/30/2020	7/30/2021		N	Water Damage - Non Weather Related	CLOSED	12/19/2017		
334315		10/6/2017		4/18/2020	4/18/2021		N	Water Damage - Weather Related	CLOSED	11/10/2017		
716914		11/23/2017		6/25/2017	6/25/2018		N	Water Damage - Weather Related	CLOSED	12/21/2017		

Summary Book of Business New Business **Claims - FNOL**

Continued on next page

Dashboard Tab, Continued

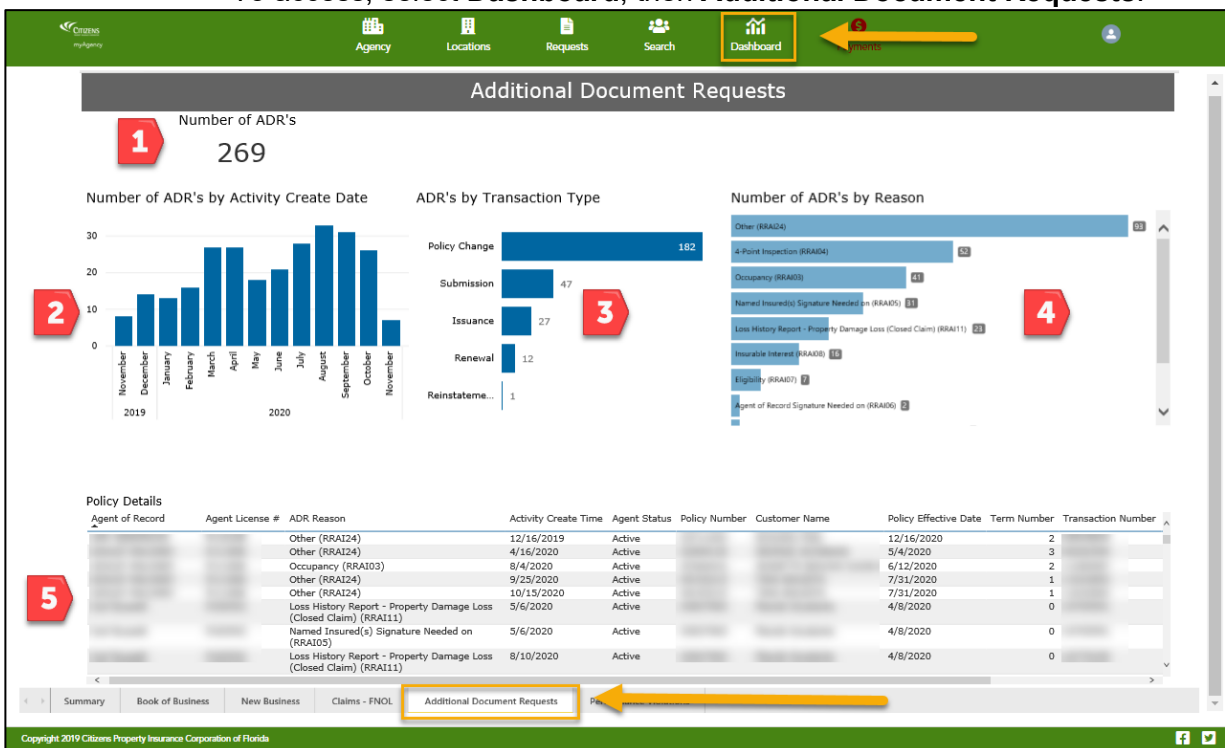
Additional Document Requests Tab

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

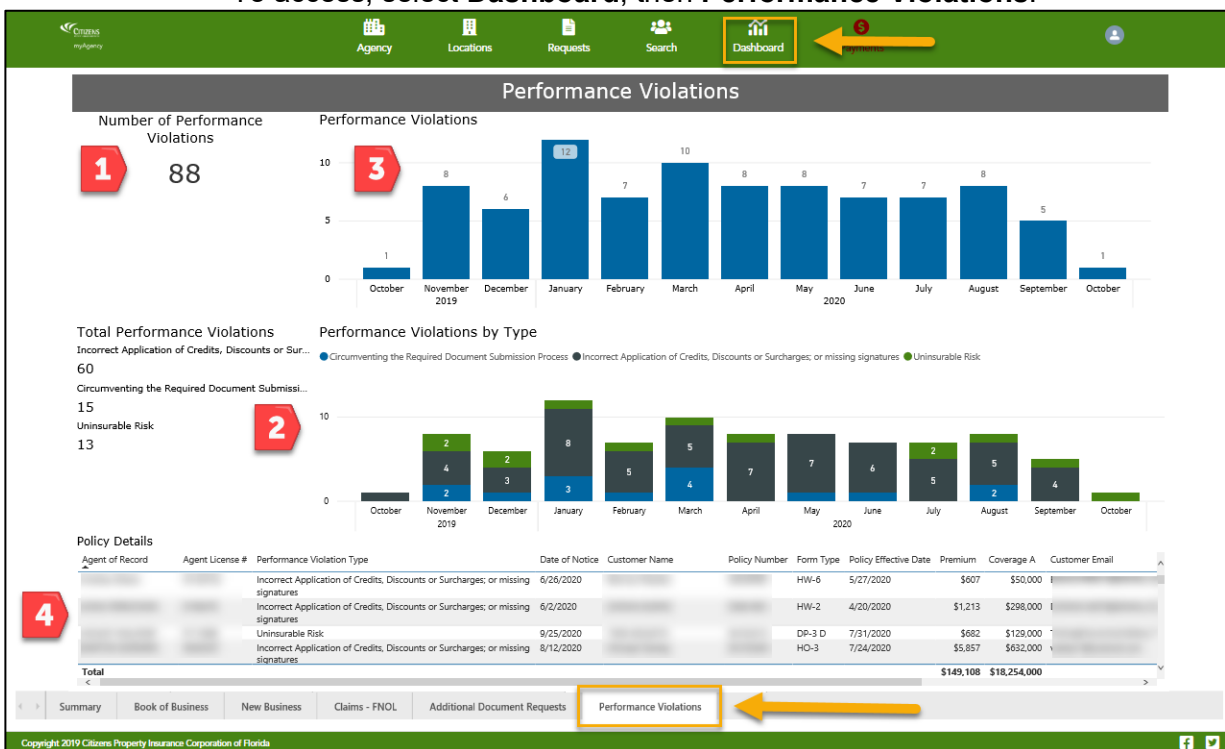
Dashboard Tab, Continued

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**:



Continued on next page

Dashboard Tab, Continued

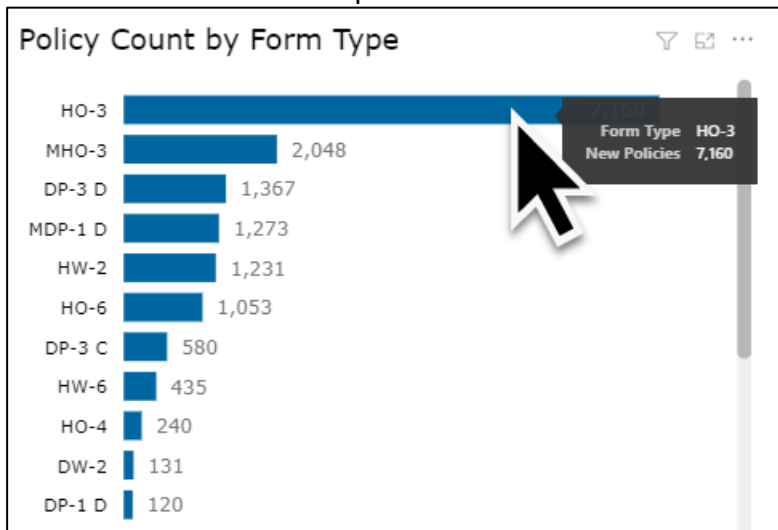
Viewing, Filtering and Exporting Dashboard Data

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:

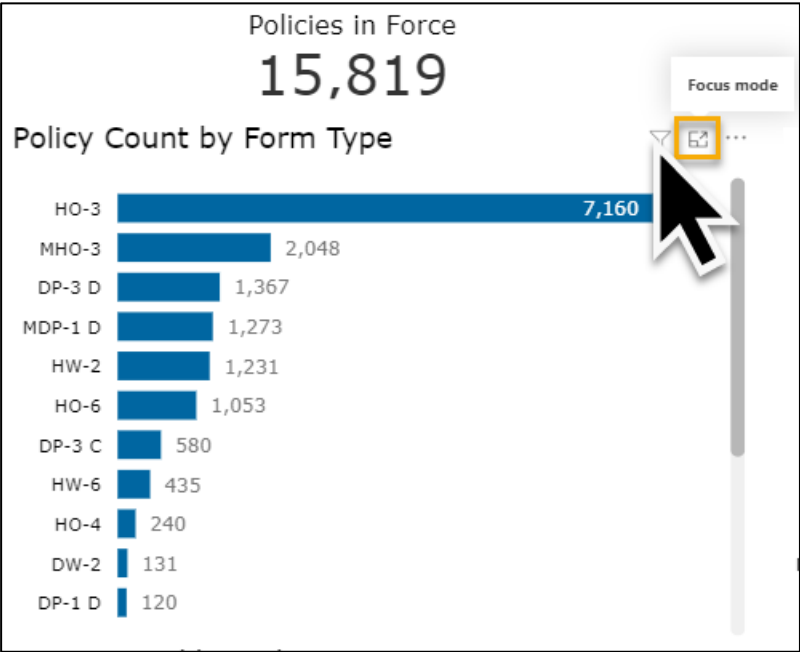
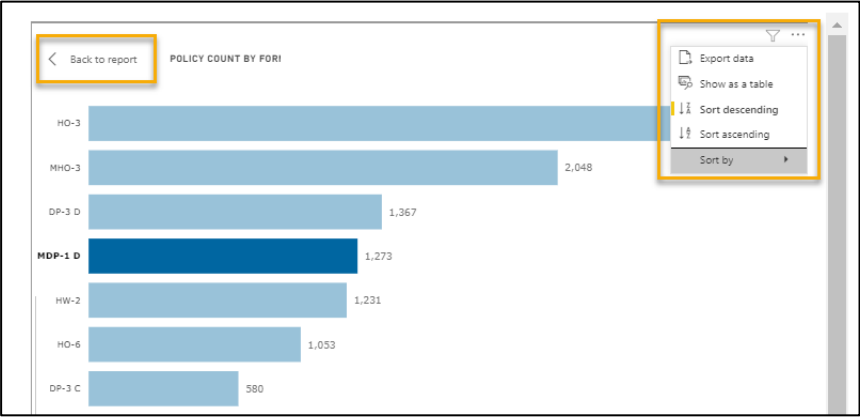
- View, sort and filter reports
- Export reports to Excel

To	Action																								
<p>View Report Details View details about the data behind the chart on both dashboards and reports.</p>	<p>Hover over a tile to view details about the data behind the visual on both dashboards and reports.</p>  <table border="1"> <caption>Policy Count by Form Type</caption> <thead> <tr> <th>Form Type</th> <th>Count</th> </tr> </thead> <tbody> <tr> <td>HO-3</td> <td>2,048</td> </tr> <tr> <td>MHO-3</td> <td>1,367</td> </tr> <tr> <td>DP-3 D</td> <td>1,273</td> </tr> <tr> <td>MDP-1 D</td> <td>1,231</td> </tr> <tr> <td>HW-2</td> <td>1,053</td> </tr> <tr> <td>HO-6</td> <td>580</td> </tr> <tr> <td>DP-3 C</td> <td>435</td> </tr> <tr> <td>HW-6</td> <td>240</td> </tr> <tr> <td>HO-4</td> <td>131</td> </tr> <tr> <td>DW-2</td> <td>120</td> </tr> <tr> <td>DP-1 D</td> <td>120</td> </tr> </tbody> </table>	Form Type	Count	HO-3	2,048	MHO-3	1,367	DP-3 D	1,273	MDP-1 D	1,231	HW-2	1,053	HO-6	580	DP-3 C	435	HW-6	240	HO-4	131	DW-2	120	DP-1 D	120
Form Type	Count																								
HO-3	2,048																								
MHO-3	1,367																								
DP-3 D	1,273																								
MDP-1 D	1,231																								
HW-2	1,053																								
HO-6	580																								
DP-3 C	435																								
HW-6	240																								
HO-4	131																								
DW-2	120																								
DP-1 D	120																								

Continued on next page

Dashboard Tab, Continued

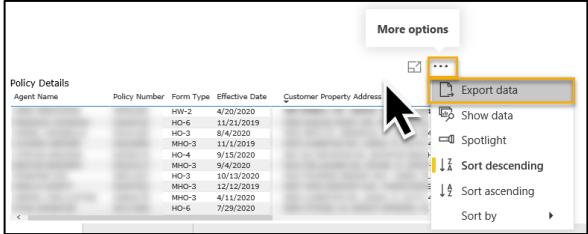
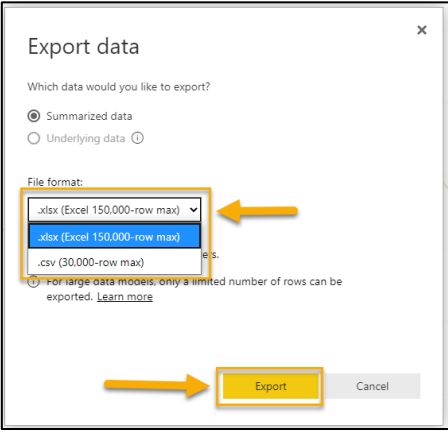
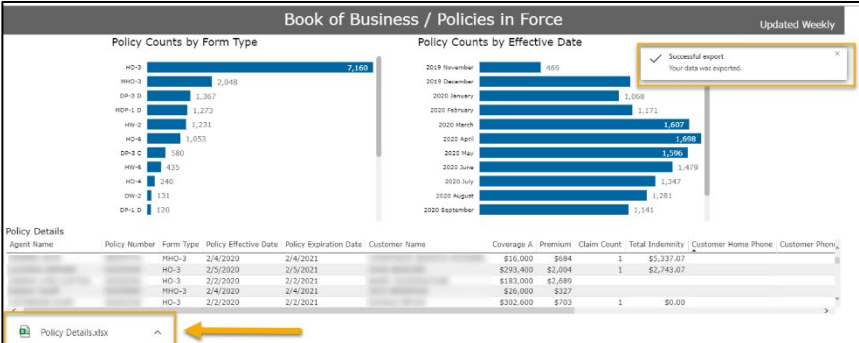
Viewing, Filtering and Exporting Dashboard Data, continued

To	Action
<p>View in Focus Mode Use <i>Focus Mode</i> to expand a chart or graph.</p> <p><i>Tip:</i> You can use the <i>Focus mode</i> for a better view of the objects in the dashboard. Filters can be applied in <i>Focus mode</i>.</p>	<p>Hover on the tile until the option for <i>Focus mode</i> displays. Select Focus Mode.</p>  <p>Result: The selected chart or graph displays.</p> <ul style="list-style-type: none"> • To exit Focus mode, select Back to report. • Hover on the chart to access filter and export options. 

Continued on next page

Dashboard Tab, Continued

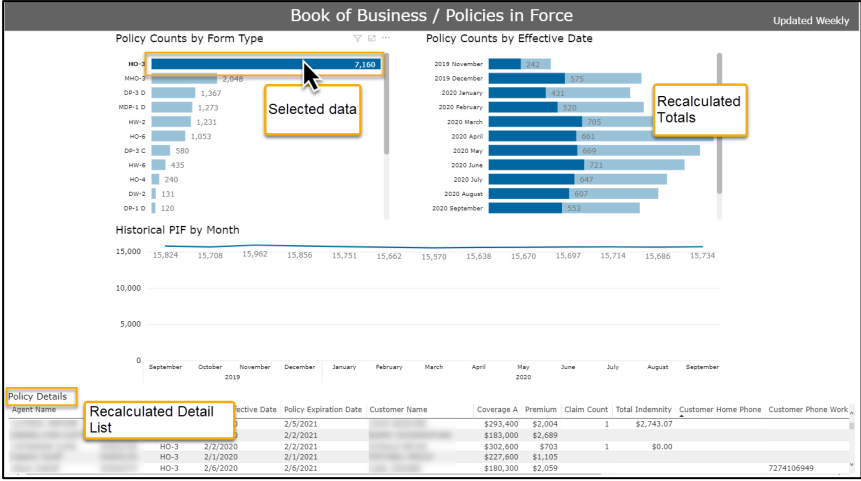
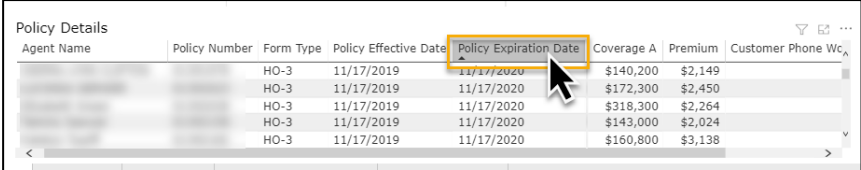
Viewing, Filtering and Exporting Dashboard Data, continued

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

Continued on next page

Dashboard Tab, Continued

Viewing, Filtering and Exporting Dashboard Data, continued

To	Action
<p>Drill Down Data in a Chart or Graph The total number for each data set will display by default.</p>	<p>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.</p>  <p>Click within the tile again to clear drill-down settings.</p>
<p>Filter Data in a List Create a custom report using list filters.</p> <p><i>Tip:</i> 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.</p>	<p><i>Policy Details</i> 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.</p>  <p>Result: The list will re-sort based on your selection.</p>

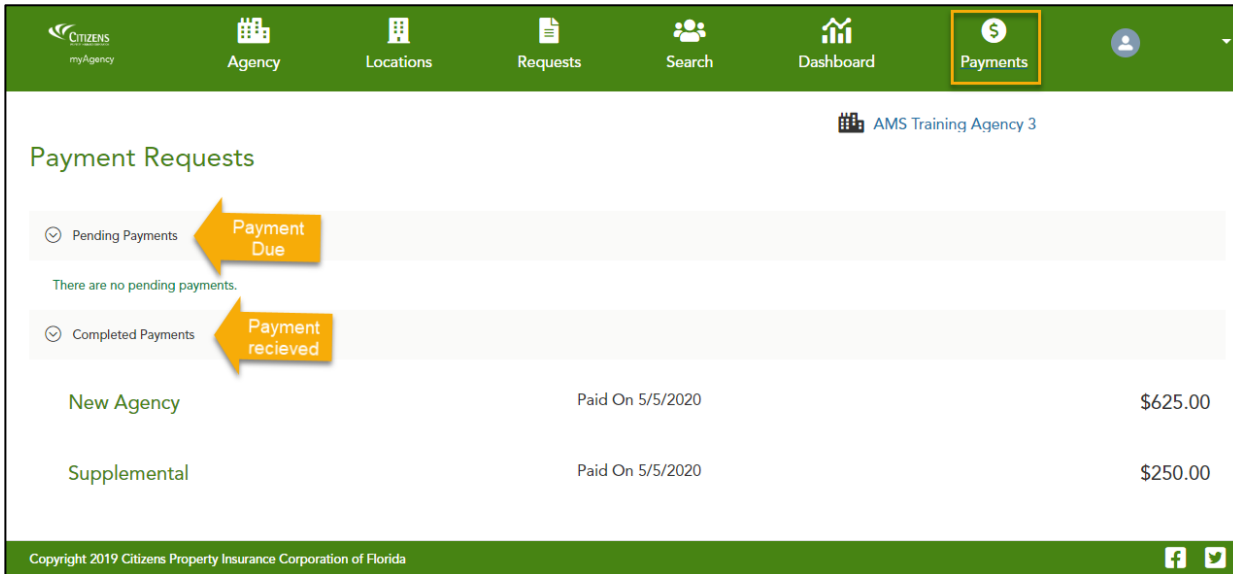
Continued on next page

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



AMS Training Agency 3

Payment Requests

Pending Payments **Payment Due**
 There are no pending payments.

Completed Payments **Payment recieved**

New Agency	Paid On 5/5/2020	\$625.00
Supplemental	Paid On 5/5/2020	\$250.00

Copyright 2019 Citizens Property Insurance Corporation of Florida

Continued on next page

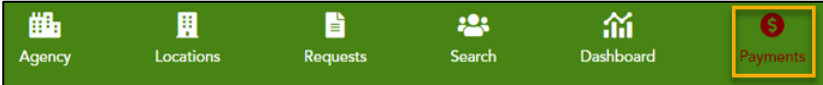
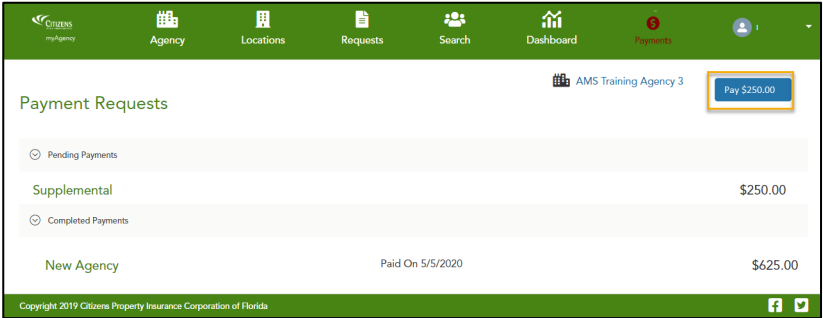
Payments Tab, Continued

Making a Payment

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



To make a payment:

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

Continued on next page

Payments Tab, Continued

Making a Payment, continued

Step	Action
3	<p>Enter the email address you will need the payment receipt issued to and select the desired payment method. Ex. 'Credit Card', then select Continue:</p> <div data-bbox="581 548 1339 1203" style="border: 1px solid #ccc; padding: 10px;"> </div> <p>Result: The <i>One-Time Payment</i> screen appears.</p>

Continued on next page

Payments Tab, Continued

Making a Payment, continued

Step	Action
4	<p>Ensure payment information is correct, then select Continue:</p> <div data-bbox="581 449 1377 1381" style="border: 1px solid #ccc; padding: 10px;"> <p>Enter Payment Information</p> <p>All fields are required unless labeled as optional.</p> <p>First Name <input type="text"/> Agency Name, if applicable</p> <p>Last Name <input type="text"/> ZIP Code 32250</p> <p>Email <input type="text" value="bill.gates@msn.com"/></p> <p>Pay this Amount \$ <input type="text" value="781.00"/></p> <p>Due Date: 10/01/2029</p> <p>Payment Method</p> <p><input type="radio"/> echeck eCheck / Bank Account</p> <p><input type="radio"/> VISA <input type="radio"/> MasterCard <input type="radio"/> DISCOVER Debit Card</p> <p><input checked="" type="radio"/> VISA <input type="radio"/> MasterCard <input type="radio"/> DISCOVER Credit Card</p> <p>Card Number <input type="text" value="..."/> CVV <input type="text" value="..."/></p> <p>Expiration Date <input type="text" value="04 - April"/> <input type="text" value="2024"/></p> <p>Card Holder Name <input type="text" value="..."/></p> <p>Zip Code <input type="text" value="..."/></p> <p><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p> </div> <p>Result: The <i>Confirm Payment</i> screen will appear.</p>

Continued on next page

Payments Tab, Continued

Making a Payment, continued

Step	Action
5	<p>The payment amount will display. elect the Authorize box before proceeding to the blue 'Pay \$0.00' button at the bottom of the screen.</p> <div data-bbox="578 512 1159 968" style="border: 1px solid black; padding: 10px;"> </div> <p>Note: You must agree to the terms and conditions prior to proceeding.</p>
6	<p>The Payment Receipt will generate if processed successfully. Options will appear at the bottom of the confirmation to either Print or return Back to Home. Payment confirmation will be sent to the email on file.</p> <div data-bbox="578 1171 1078 1680" style="border: 1px solid black; padding: 10px;"> </div>

Continued on next page

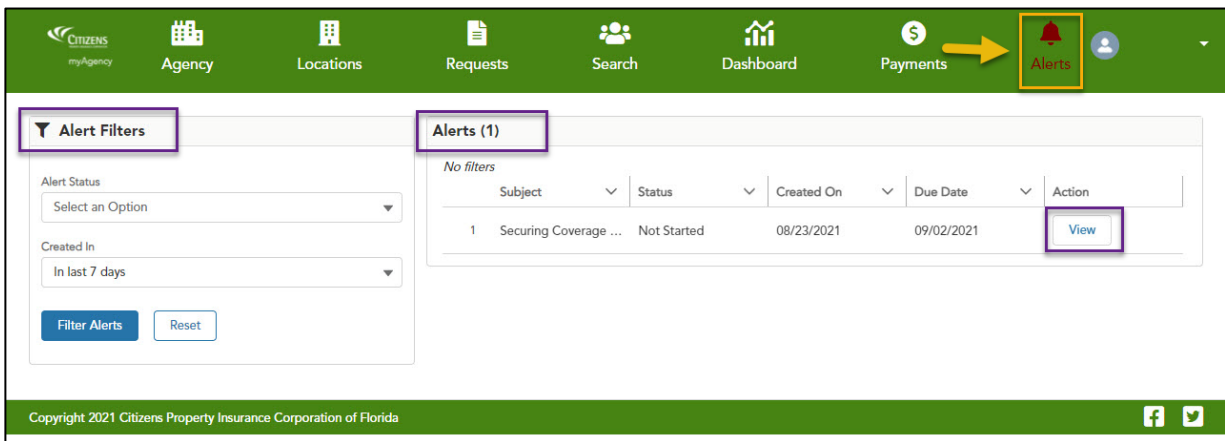
Alerts Tab

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

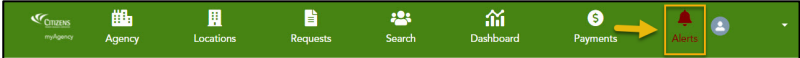
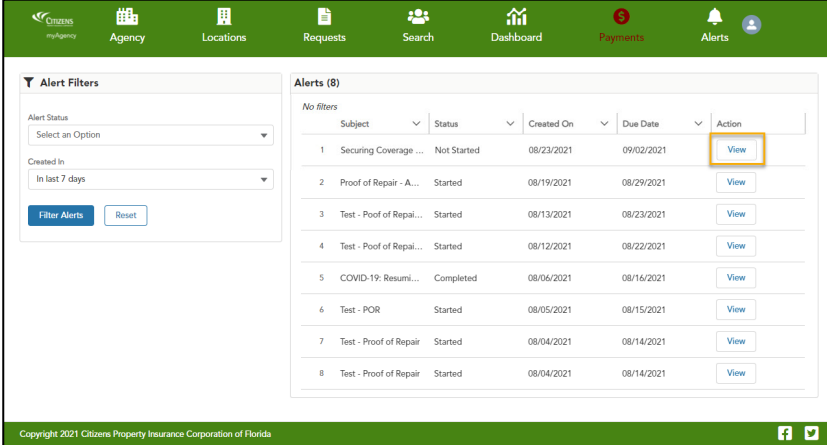
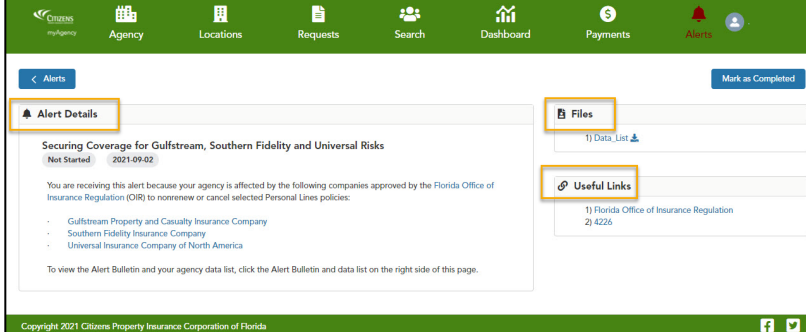


Continued on next page

Alerts Tab, Continued

Accessing Alerts

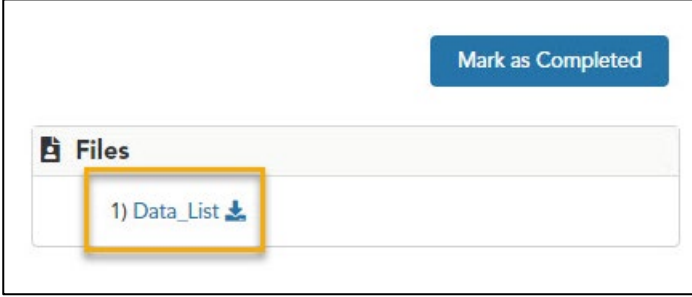
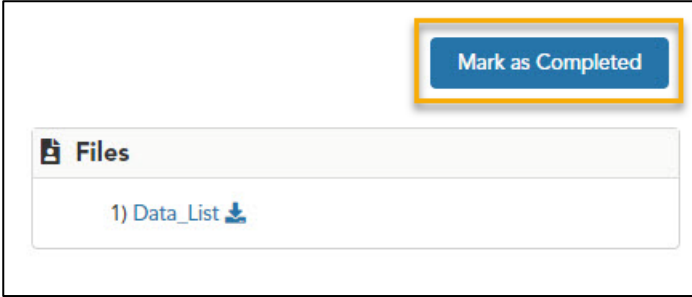
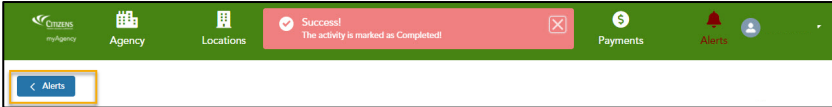
When new alerts and policy files are sent, the *Alerts* tab will display red. To access the alert:

Step	Action
1	<p>Select the Alerts tab.</p>  <p>Result: The <i>Alerts</i> tab will display a list of recent communications and their status:</p> <ul style="list-style-type: none"> • <i>Not Started</i> • <i>Started</i> • <i>Completed</i> <p><i>Note:</i> Tasks that have not been completed will display first.</p>
2	<p>Select View from the <i>Actions</i> column.</p>  <p>Result: The communication displays.</p>
3	<p>The alert task will include the following:</p> <ul style="list-style-type: none"> • <i>Alert Details</i> to clarify what action is needed • Files will include the policy files pertaining to the Alert Details • <i>Useful Links</i> will include links to job aids, guides and additional resources. 

Continued on next page

Alerts Tab, Continued

Accessing Alerts, continued

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

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 credentialed 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	<p><i>Can the staff member write new business?</i></p> <p>Will staff member be an Agent of Record on policies written by your agency?</p> <p>Then indicate <i>Lines of Authority</i></p>	Fully appointed agent
Write new business and services under a fully appointed agent	Single location	<i>Can the staff member write new business?</i>	Limited agent
Write new business and services under a fully appointed agent	Single location	<i>Can the staff member write new business?</i>	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	<i>Is Support Staff?</i>	View-Only Support Staff

Appendix 2: Agent Appointment Education Requirements

Overview

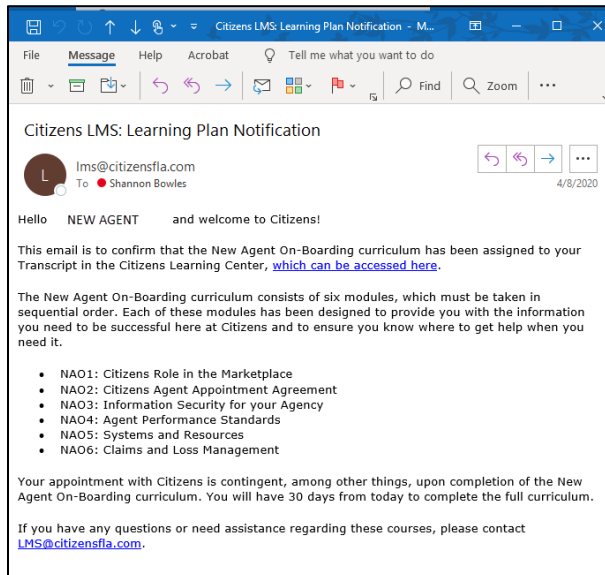
Agents must successfully complete Citizens' training modules prior to completing their appointment process.

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

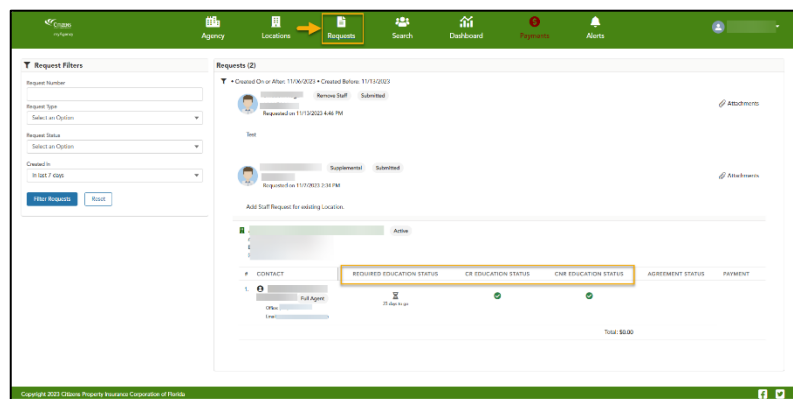
Agents seeking appointment will receive an email from Citizens indicating the following online modules must be completed:



- 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.



Continued on next page

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

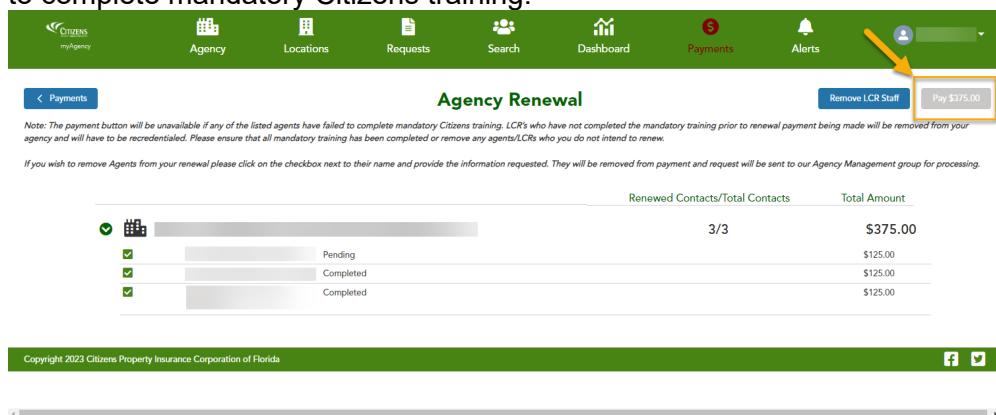
Citizens has created multiple resources to assist with all aspects of writing and servicing business. To access job aids and guides, login to the Citizens *Agents* website, then select **Training**. Select **Personal** or **Commercial** to view the full library of resources.

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:



Agency Renewal

Note: The payment button will be unavailable if any of the listed agents have failed to complete mandatory Citizens training. 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 recredentialled. Please ensure that all mandatory training has been completed or remove any agents/LCRs who do not intend to renew.

If you wish to remove Agents from your renewal please click on the checkbox next to their name and provide the information requested. They will be removed from payment and request will be sent to our Agency Management group for processing.

	Renewed Contacts/Total Contacts	Total Amount
<input checked="" type="checkbox"/>  [Agency Name]	3/3	\$375.00
<input checked="" type="checkbox"/> [Agent Name] Pending		\$125.00
<input checked="" type="checkbox"/> [Agent Name] Completed		\$125.00
<input checked="" type="checkbox"/> [Agent Name] Completed		\$125.00

Continued on next page

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:

The screenshot shows the 'Agency Renewal' page with a table of agents. A dropdown menu is open for the 'Pending' agent, showing options: 'Agent no Longer at Agency', 'Agent no Longer Conducts Citizen...', and 'Training Not Complete'. An orange arrow points to the 'Training Not Complete' option.

Agent Status	Renewed Contacts/Total Contacts	Total Amount
Completed	3/3	\$375.00
Pending		\$125.00
Completed		\$125.00
Completed		\$125.00

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:

The screenshot shows the 'Agency Renewal' page with the 'Remove LCR Staff' and 'Pay \$250.00' buttons highlighted with orange boxes. The table below shows the agent status.

Agent Status	Renewed Contacts/Total Contacts	Total Amount
Not Completed	2/3	\$250.00
Completed		\$125.00
Completed		\$125.00

Continued on next page

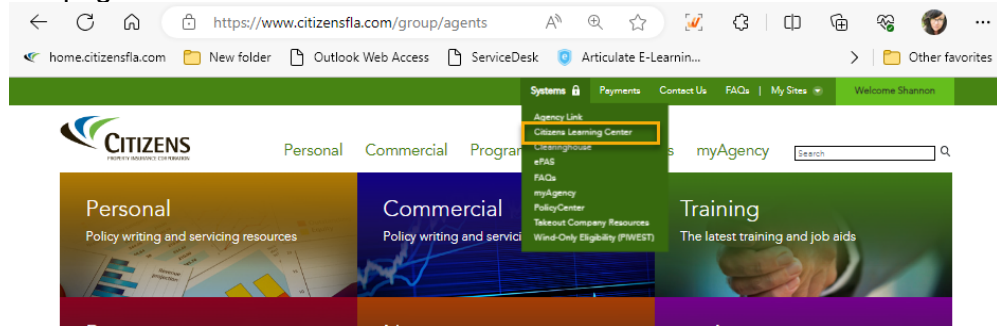
Appendix 2: Agent Appointment Education Requirements, Continued

Mandatory Training: Renewal Education Requirements, continued

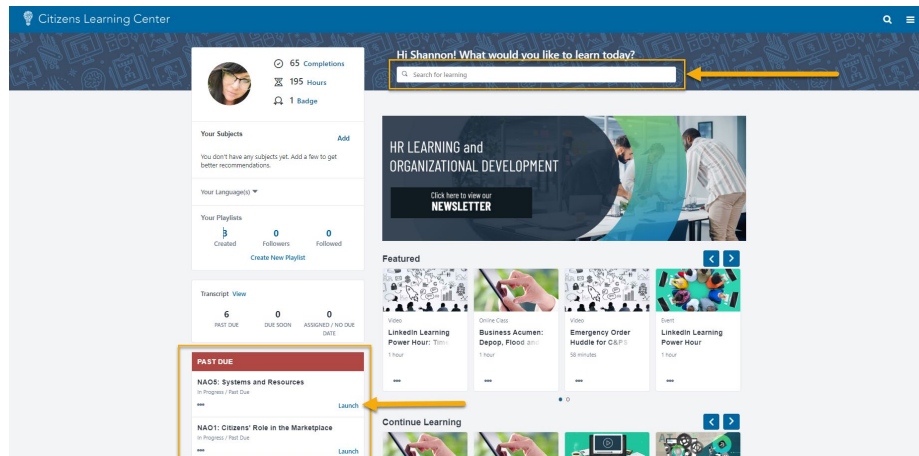
Avoiding Blocked Renewals or Revoked Credentials

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.