



Agency



Locations



Requests



Search



Dashboard



Payments



User Guide for Agency Principals and their Designees



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Welcome to myAgency

What Is myAgency?

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

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

Who Can Access myAgency?

myAgency was developed specifically for APs and APDs.

What are the Benefits?

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

Using myAgency, APs and APDs can:

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

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

Note: APs and APDs have identical rights to myAgency.

Browser Requirements and Access

Browser Requirements

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

Username and Passwords

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



Sign in

Citizens Account

OR

Sign in with your email address

Email Address

Password [Forgot your password?](#)

Sign in

By clicking *Sign in*, I agree to the Citizens [Terms and Conditions](#).

Login Instructions

- Citizens' staff and external adjusters with a Citizens account: Select Citizens Account to login.
- External users: Enter your email address and password to sign in. To reset or create a new password, enter your email address and select the Forgot Password link

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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.



myIdentity

Account Registration Confirmation

Oct 18, 2023

Attn:

A new account has been created for you with Citizens Property Insurance Corporation for the following systems:

- CenterPoint
- External Website
- myPolicy

Below is the email address should be used for accessing the system(s). Please retain this information for your records.

Email Address: test-cox@yahoo.com

Click the following link to log in, then follow the instructions to complete your registration. If the link does not automatically redirect you, copy and paste the entire link into your browser window

Registration link: https://cpicdevb2c.b2clogin.com/cpicdevb2c.onmicrosoft.com/oauth2/v2.0/authorize?rp=B2C_1A_PASSWORDRESET&client_id=3ec96b1c-a337-4492-8058-a25b045c5d5f&nonce=defaultNoncedirect_uri=https://www.citizensfla.com/scope=openid%2Fresponse_type=id_token%2Fprompt=login

Do not reply to this email. If you have a question about this email, contact Customer Care Center at 866.411.2742 or use our [Contact Us](#) form.

This email is not spam. You received this email because you are a Citizens policyholder, and we want to convey important information about your policy. Citizens uses your personal information only as authorized or required by law and as necessary to provide our products and services to you. Citizens does not use or share your personal information for marketing purposes. For more details, please see the [Privacy Policy](#) on the Citizens website.



Citizens Property Insurance Corporation

www.citizensfla.com

myPolicy

Report and view claims. Enroll in paperless delivery. Make payments. Access policy documents.

866.411.2742

Report a claim 24/7/365 or

Get specific policy information weekdays from 9:00 a.m. to 5:30 p.m. ET

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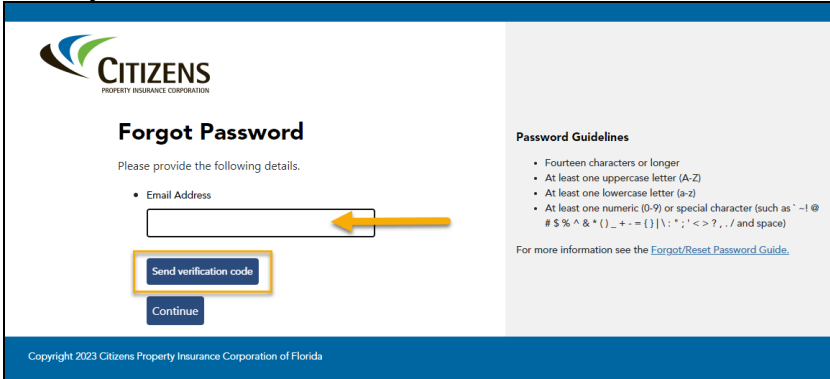
5

Citizens Property Insurance Corporation 10.12.2026
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Browser Requirements and Access, Continued

4BUsername and Passwords, continued

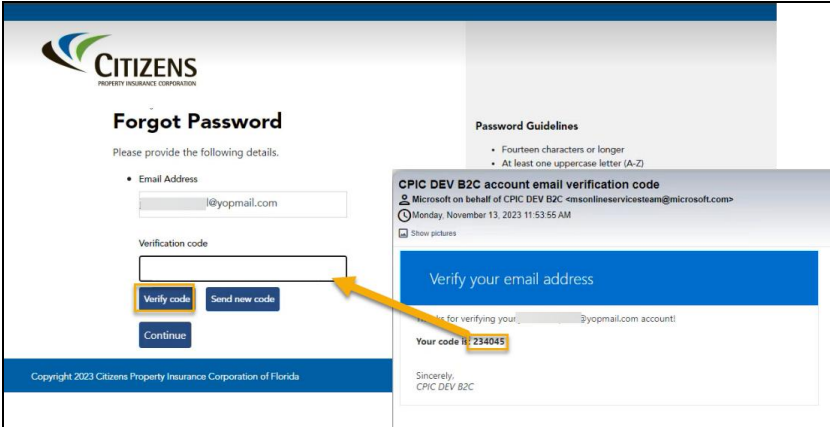
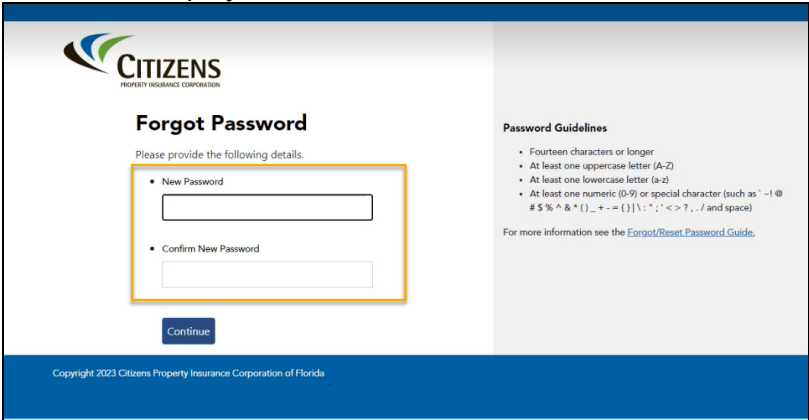
The process for establishing and/or resetting your password are similar.

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

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Browser Requirements and Access, Continued

4BUsername and Passwords, continued

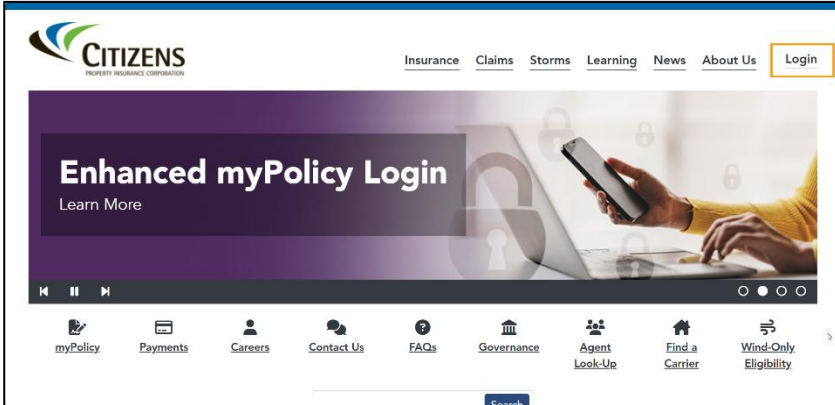
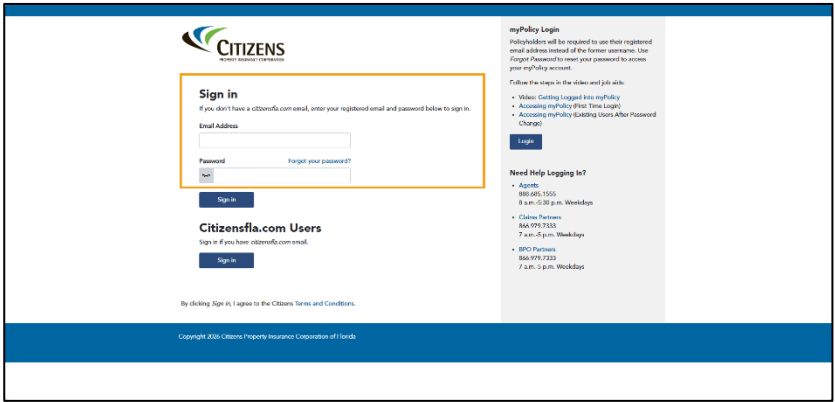
Step	Action
3	Enter the verification code indicated in the email.  <i>Note:</i> The email will be sent from <i>Microsoft on Behalf of CPIC msonlineserviceteam@microsoft.com</i>. If you do not receive the verification email, check your spam or junk folders.
4	Create and confirm new password using the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

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Browser Requirements and Access, Continued

Accessing myAgency

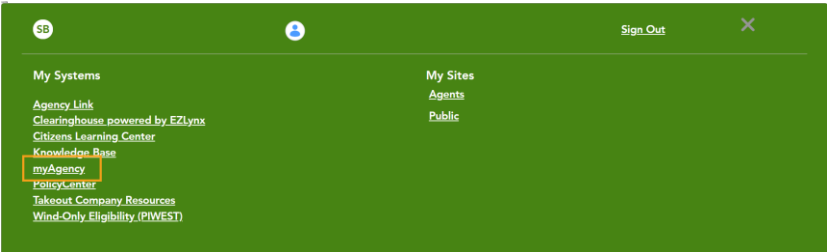
To access myAgency:

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

Continued on next page

Browser Requirements and Access, Continued

Accessing myAgency, continued

Step	Action
3	Select your initials to access the <i>My Systems</i> drop-down menu.  Select myAgency from the <i>Systems</i> drop-down menu.  Result: An additional login screen will display.

Continued on next page

Browser Requirements and Access, Continued

5BAccessing myAgency, continued

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

Basic Navigation

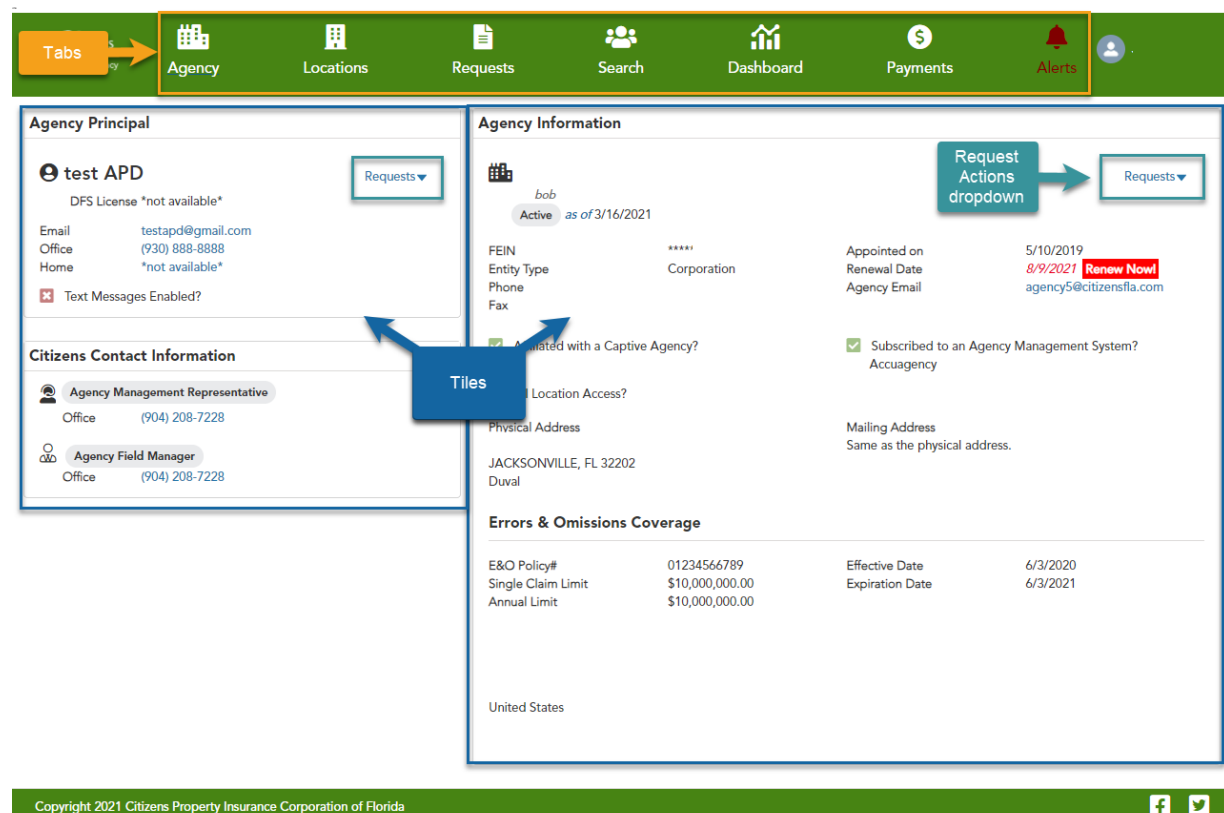
Layout: Tabs and Tiles

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

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

Each tab contains:

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



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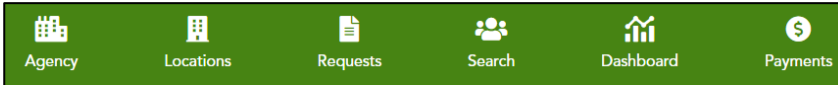
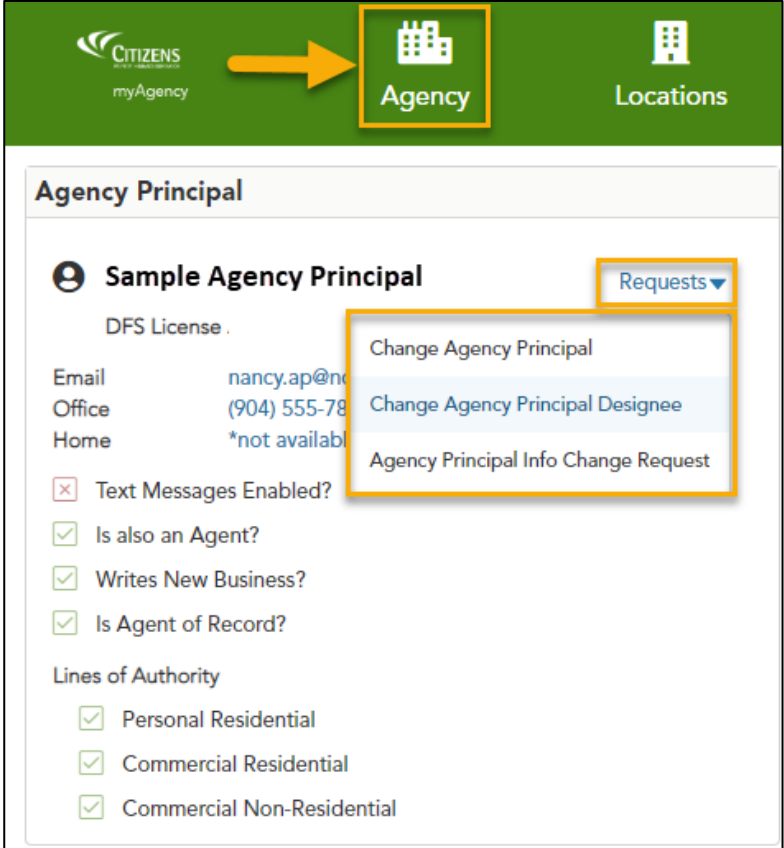
Basic Navigation, Continued

Submitting Requests

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

Note: The [Site Map](#) contains a list of all available requests.

To submit any request:

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. 

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Basic Navigation, Continued

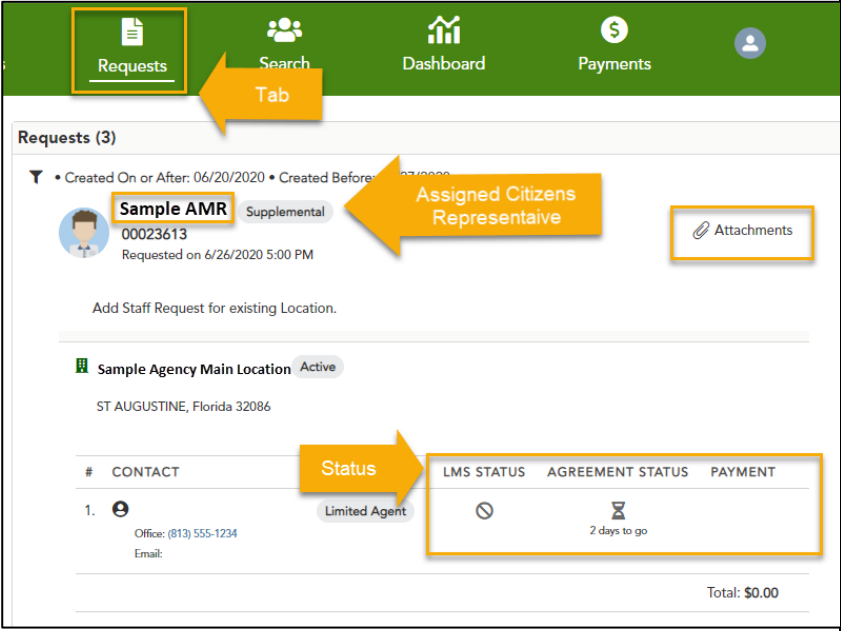
Submitting Requests, continued

Step	Action
3	From <i>Requests</i>, select the applicable request. Agency Principal Sample Agency Principal Requests DFS License Email nancy.ap@nc Office (904) 555-78 Home *not available Change Agency Principal Change Agency Principal Designee Agency Principal Info Change Request Text Messages Enabled? Is also an Agent? Writes New Business? Is Agent of Record? Lines of Authority Personal Residential Commercial Residential Commercial Non-Residential
	Result: The applicable request screen will display.
4	Complete the applicable request, then select Submit. Agency Principal Designee Change Request Add/Remove Agency Principal Designee *Option Add as APD *Select Staff Sample Staff Name Limited Ac *Option Select an option *Select Staff Select Staff Add Staff Remove Staff Submit Close 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.
	Result: A confirmation banner will appear after any request is successfully submitted.

Continued on next page

Basic Navigation, Continued

Submitting Requests, continued

Step	Action
5	To confirm the status of any submitted change, select the Requests tab. The request, any uploaded files and the assigned Citizens' contact will display. <i>Note:</i> If the request is auto approved, the AP's or APD's name will display.  The screenshot displays the 'Requests' tab in the myAgency interface. The top navigation bar shows 'Requests' as the active tab. Below the navigation bar, the 'Requests (3)' section is visible. A specific request is shown with the title 'Sample AMR' and the status 'Supplemental'. The request is assigned to a 'Sample Agency Main Location' in 'ST AUGUSTINE, Florida 32086'. The 'Status' section shows 'LMS STATUS' as 'Limited Agent', 'AGREEMENT STATUS' as '2 days to go', and 'PAYMENT' as '\$0.00'. The 'Attachments' section is also visible.

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

Continued on next page

Basic Navigation, Continued

Site Map, continued

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

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*

Agency
Locations
Requests
Search
Dashboard
Payments

Agency Principal

Sample Agency Principal
Requests

DPS License

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

Agency Information

AMS Training Agency 2
Requests

Active as of 5/4/2020

FEIN: *****
Entity Type: Corporation
Phone: (904) 555-4567
Fax:

Appointed on: 5/4/2020
Renewal Date: 5/4/2021
Agency Email: amsagency2@noemail.com

☒ Affiliated with a Captive Agency?
☒ All Location Access?

☒ Subscribed to an Agency Management System? QQ

Physical Address: SAINT AUGUSTINE, FL 32084
Saint Johns

Mailing Address: Same as the physical address.

Citizens Contact Information

Citizens' AgencyRep
Agency Management Representative

Office: (904) 208-

Citizens' AgencyFieldManager
Agency Field Manager

Office: (904) 208-

Errors & Omissions Coverage

E&O Policy# 888
Single Claim Limit \$1,000,000.00
Annual Limit \$1,000,000.00

Effective Date 1/1/2020
Expiration Date 1/1/2021

E&O CO.
PONTE VEDRA BEACH, FL 32084
United States
(888) 555-7777

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Agency Tab, Continued

Agency Principal Tile

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

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

Additional details about the AP also display, including:

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

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

To update the information listed above, submit a request.

Agency Principal

Sample Agency Principal

Requests ▼

DFS License

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

Continued on next page

Agency Tab, Continued

Request:
Change
Agency
Principal,
continued

Step	Action
3	Select the new AP from the <i>Select Staff</i> drop-down menu. Agency Principal Change Request 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. *New Agency Principal Select Staff Sample Staff Name - LCR Sample Staff Name Limited Agent Sample Staff Name Full Agent Sample Staff Name Support Staff Submit Cancel Request
4	Indicate if the current AP no longer works for the agency. Result: If checked, the <i>Agent receiving book of business</i> field will appear. Agency Principal Change Request 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. *New Agency Principal Sample Staff Name Full Agent Complete this field. ☒ Click here if the Agency Principal (Sample Staff Name) no longer works for the agency. Indicate any additional updates needed in the field below Submit Cancel Request

Continued on next page

Agency Tab, Continued

Request:
Change
Agency
Principal,
continued

Step	Action
5	If applicable, select an eligible staff member to transfer the book of business to. Indicate if any additional updates are needed, then select Submit. Agency Principal Change Request <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> * New Agency Principal Sample Staff Name Full Agent ☒ Click here if the Agency Principal (Sample Staff Name) no longer works for the agency. * Agent receiving the book of business Select Agent Sample Staff Name Indicate any additional updates needed in the field below Submit Cancel Request Result: The new AP must sign a new agency agreement. Citizens will email it to them. Once signed and returned, Citizens will process the request.

Continued on next page

Agency Tab, Continued

Request:
Change
Agency
Principal
Designee

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

To request a change to the AP designee:

Step	Action
1	Access the Agency tab, then navigate to the Agency Principal tile. <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.
2	Select the Requests drop-down menu, then select Change Agency Principal Designee <i>Result:</i> <i>Agency Principal Designee Change</i> request screen appears.

Continued on next page

Agency Tab, Continued

Request:
Change
Agency
Principal
Designee,
continued

Step	Action
3	Indicate if an AP designee (APD) is being added or removed. Agency Principal Designee Change Request Add/Remove Agency Principal Designee *Option Select an option Add as APD Remove as APD *Select Staff Select Staff
4	Select the APD to add or remove. Agency Principal Designee Change Request Add/Remove Agency Principal Designee *Option Add as APD + Add Staff Submit Close *Select Staff Sample Staff Name Limited A... Sample Staff Name LCR ✓ Sample Staff Name Limited A... Sample Staff Name Staff The Agency Principal Designee (APD) has the same request any and all agency information, including su terminations, agency changes, commission inquiries, etc.

Continued on next page

Agency Tab, Continued

Request:
Change
Agency
Principal
Designee,
continued

Step	Action
5	If additional changes are needed, select Add Staff, then repeat Steps 3 and 4. Select Submit. Agency Principal Designee Change Request Add/Remove Agency Principal Designee * Option Add as APD * Select Staff Sample Staff Name - Limited Ac * Option Select an option * Select Staff Select Staff + Add Staff - Remove Staff Submit Close 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. Note: Up to five ADP's can be added per request. Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.

Continued on next page

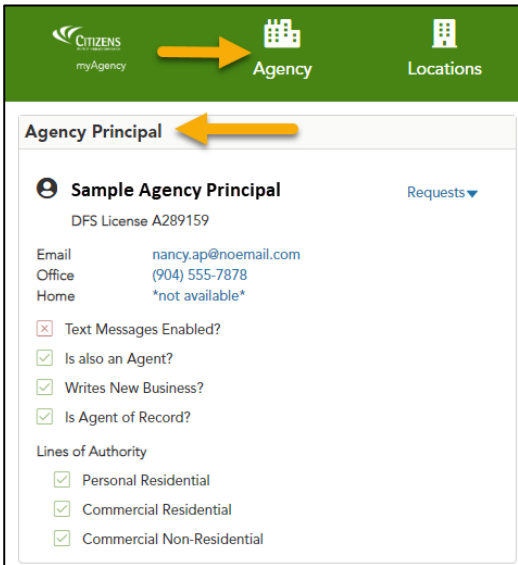
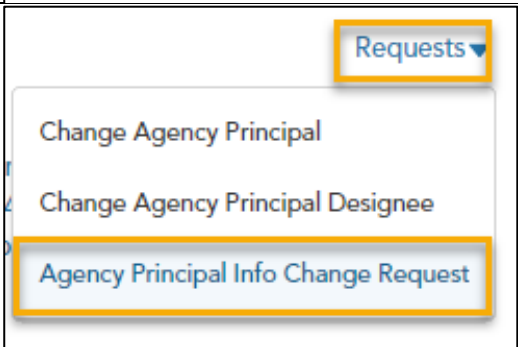
Agency Tab, Continued

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

Continued on next page

Agency Tab, Continued

Request:
Agency
Principal Info
Change
Request,
continued

Step	Action
3	Information currently on file displays. Select a field to update applicable information. If the AP's location has changed, select from an existing location listed in the Change Location drop-down menu. Agency Principal Information Change Request Any name changes will require supporting documentation in order to submit the request. To change locations, select from a list of existing locations below. * Change Location Sample Location - Main ▼ Location Phone * First Name Sample * Office Phone 999-555-5555 Fax * Email agencyprincipal@noemail.com * Last Name Agency Principal Extension Submit Cancel Request
4	Select Submit. Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab. Submit Cancel Request

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

Active

as of 5/4/2020

FEIN

Entity Type

Corporation

Phone

(904) 555-4555

Fax

Appointed on

5/4/2020

Renewal Date

5/4/2021

Agency Email

amsagency2@noemail.com

☐

Affiliated with a Captive Agency?

☒

Subscribed to an Agency Management System?

QQSolutions - Quick File

☐

All Location Access?

Physical Address

Saint Johns

Mailing Address

Same as the physical address.

Errors & Omissions Coverage

E&O Policy#

Single Claim Limit

Annual Limit

\$1,000,000.00

\$1,000,000.00

Effective Date

Expiration Date

1/1/2020

1/1/2021

E&O CO.

101 Library Blvd

United States

(888) 555-7777

Requests

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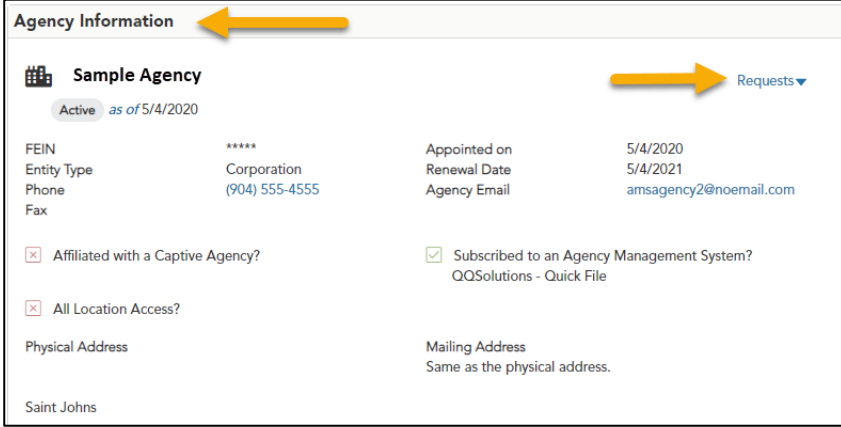
Agency Tab, Continued

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	Access the Agency tab, then navigate to the Agency Information tile. 

Continued on next page

Agency Tab

Continued

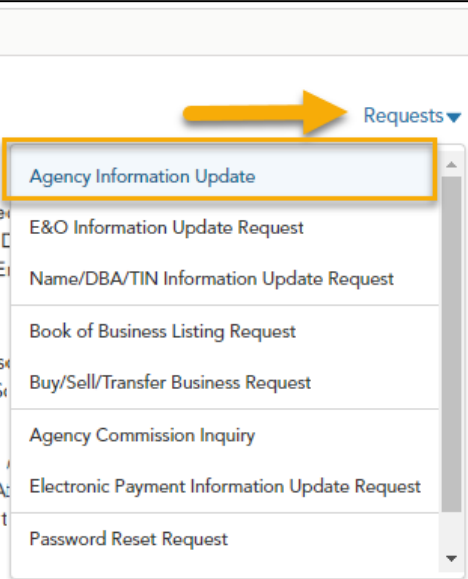
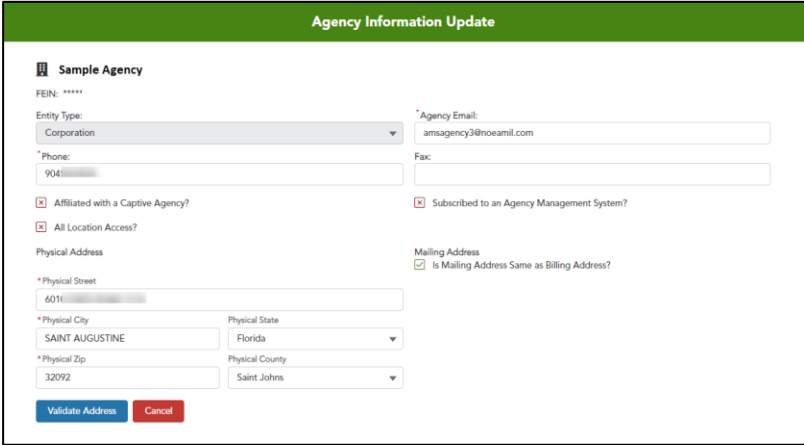
Request:

Agency

Information

Update,

continued

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

Continued on next page

Agency Tab, Continued

Request:
Agency
Information
Update,
continued

Step	Action
4	Select Validate Address. * Physical Street 6011 * Physical City SAINT AUGUSTINE * Physical Zip 32092 Physical State Florida Physical County Saint Johns Validate Address Cancel Note: The address must be standardized, even if no change has been made.] Result: Addresses validated and standardized.
5	Select Save to submit request. * Physical City SAINT AUGUSTINE * Physical Zip 32092 Physical State Florida Physical County Saint Johns Save Cancel Addresses validated and standardized. 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

Agency Tab, Continued

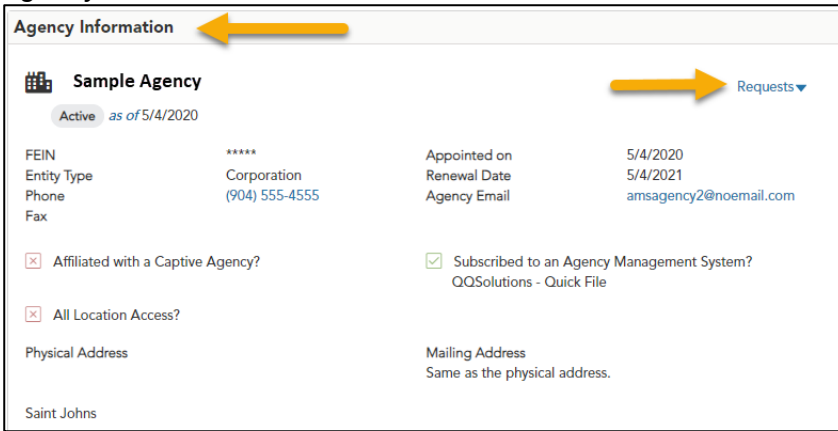
Request: E&O Information Update

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.

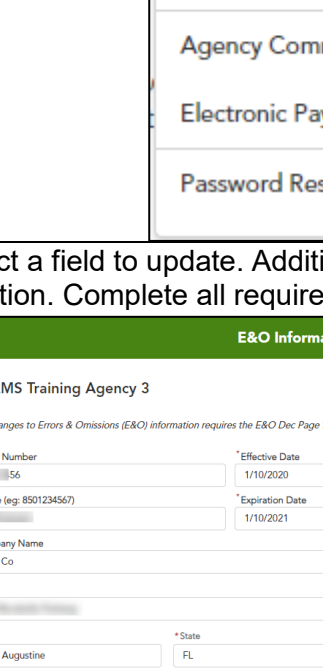
To update any of the above information:

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

Continued on next page

**Request:
E&O
Information
Update,
continued**

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



The screenshot shows the 'E&O Information Update Request' window. The title bar is green with the text 'E&O Information Update Request'. Below the title bar, there is a header section with the text 'AMS Training Agency 3'. A note states: 'Any changes to Errors & Omissions (E&O) information requires the E&O Dec Page to be uploaded with the request.' The main content area contains several form fields:

- *Policy Number: 56
- *Effective Date: 1/10/2020
- *Single Claim Limit: 1,000,000
- *Phone (e.g. 8501234567): 888
- *Expiration Date: 1/10/2021
- *Annual Aggregate Limit: 1,000,000
- *Company Name: E&O Co
- *Street: 235
- *City: Saint Augustine
- *State: FL
- *Zip: 32092
- *Country: United States

At the bottom, there are two buttons: 'Next >' and 'Cancel Request'.

Continued on next page

Agency Tab, Continued

Request:
E&O
Information
Update,
continued

Step	Action
4	Select Next. Result: The E&O Information Update Request upload screen displays. 235 * City Saint Augustine * Zip 32092 Next > Cancel Request
5	Upload the E&O declarations page. E&O Information Update Request Sample Agency Any changes to Errors & Omissions (E&O) information requires the E&O Dec Page to be uploaded with the request. Attach File: Upload Files Or drop files No Files Uploaded! Cancel Request Result: Upload progress screen will display.
6	Select Done. E&O Information Update Request AMS Training Agen Any changes to Errors & Omissions Attach File: Upload Files Or drop No Files Uploaded! Cancel Request Upload Files E&O Dec Page.docx 113 1 of 1 file uploaded Done Result: A screen summarizing the E&O changes will appear.

Continued on next page

Agency Tab, Continued

Request:
E&O
Information
Update,
continued

Step	Action						
7	Review the list of uploaded document(s). If needed, upload additional files, and delete a previously uploaded file. When complete, select Submit Request. E&O Information Update Request  AMS Training Agency 3 Any changes to Errors & Omissions (E&O) information requires the E&O Dec Page to be uploaded with the request. Attach File: Upload Files Or drop files <table><tr><th>#</th><th>File Name</th><th>Actions</th></tr><tr><td>1)</td><td>E&O Dec Page</td><td>delete</td></tr></table> Submit Request Cancel Request Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.	#	File Name	Actions	1)	E&O Dec Page	delete
#	File Name	Actions					
1)	E&O Dec Page	delete					

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Agency Tab, Continued

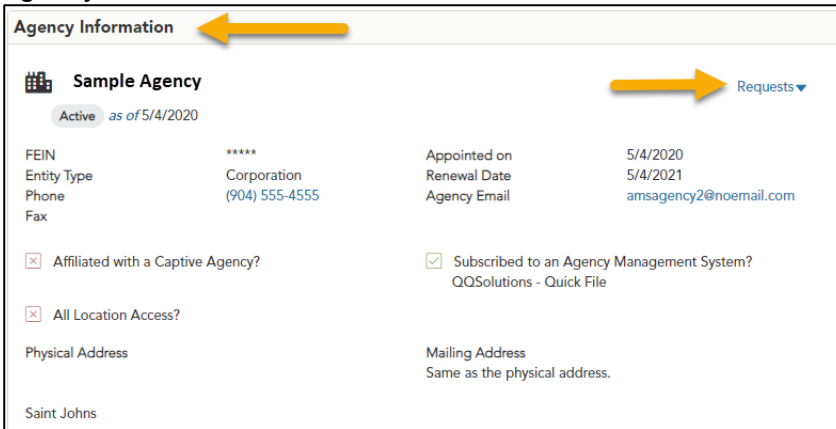
Request: Name, DBA, TIN Information Update

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.

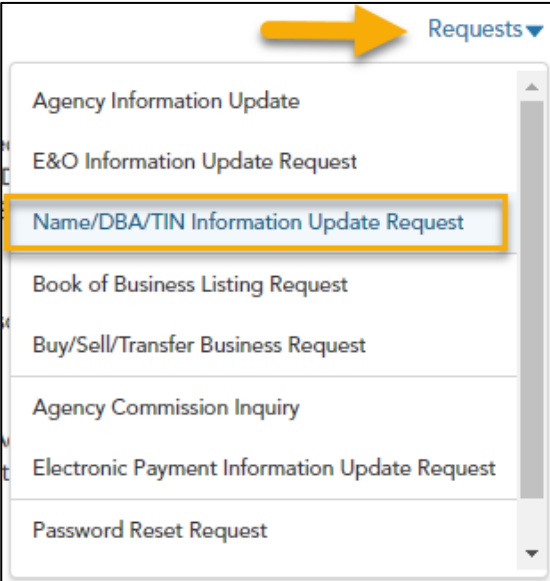
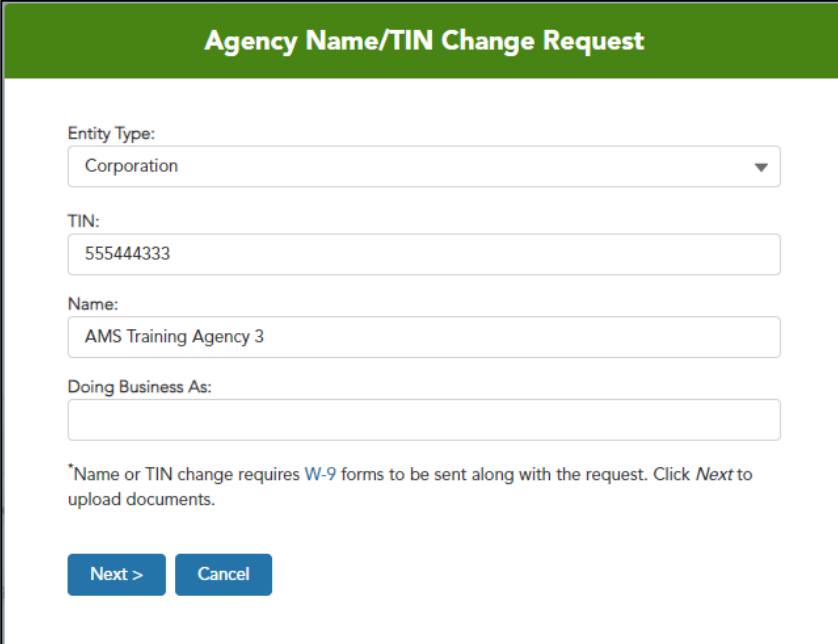
To update any of the fields list above:

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

Continued on next page

Agency Tab, Continued

Request:
Name, DBA,
TIN
Information
Update,
continued

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

Continued on next page

Agency Tab, Continued

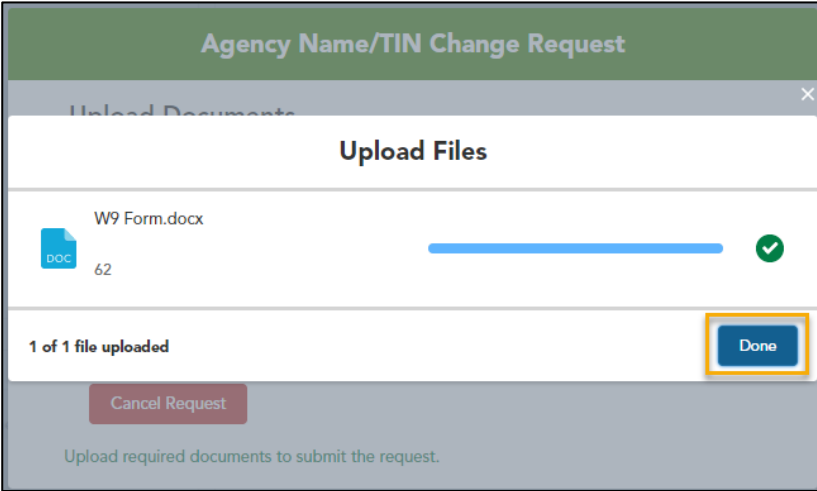
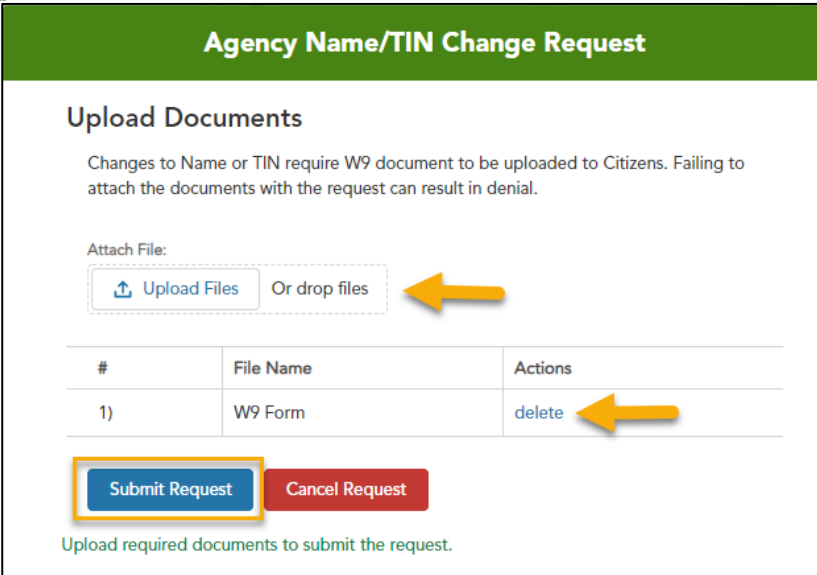
Request:
Name, DBA,
TIN
Information
Update,
continued

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

Continued on next page

Agency Tab, Continued

Request:
Name, DBA,
TIN
Information
Update,
continued

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

Continued on next page

Agency Tab, Continued

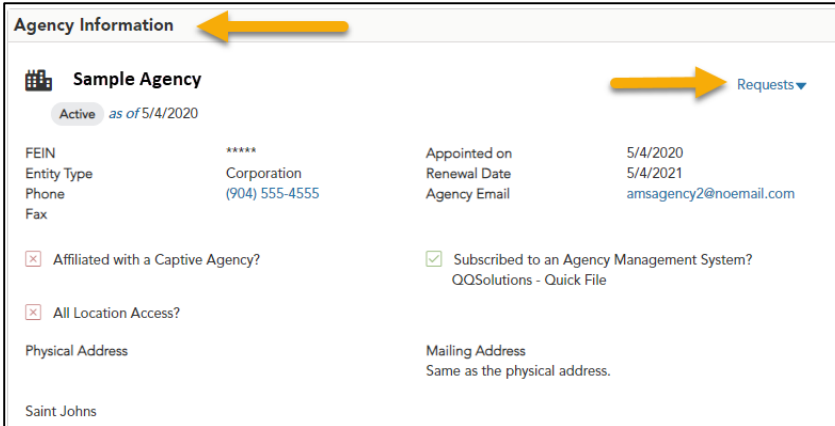
Request: Buy, Sell, Transfer

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

Notes:

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

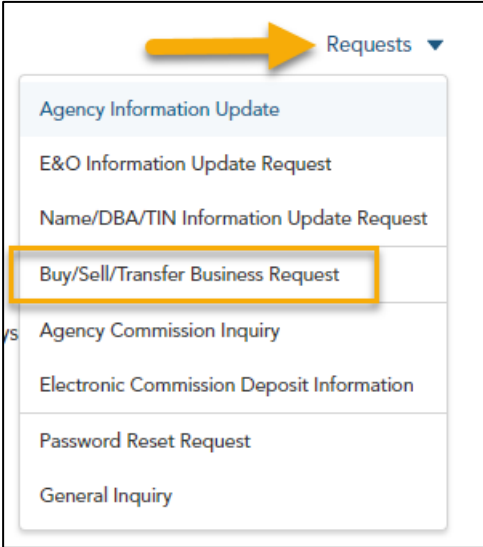
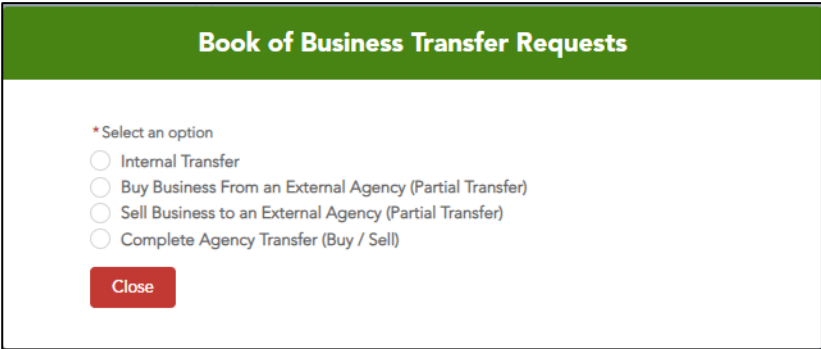
To submit this request:

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

Continued on next page

Agency Tab, Continued

Request:
Buy, Sell,
Transfer,
continued

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

Continued on next page

Agency Tab, Continued

Request:
Buy, Sell,
Transfer,
continued

Step	Action
4	Complete the applicable fields. If <i>Internal Transfer</i> is selected: - Select the relinquishing agent from the drop-down from whom you are transferring the policies. - Select the transfer effective date. - If applicable, indicate to deactivate the agent listed above. Book of Business Transfer Requests ↔ Transfer Book of Business *Agent who you are transferring policies from Select an Agent ⌵ *Transfer Effective Date 📅 ⓧ Click here to deactivate the staff member listed above Next > Cancel Request If <i>Buy Business from an External Agency (Partial Transfer)</i> is selected: - Enter a valid agency name in the <i>Selling Agency Name</i> field. <i>Note:</i> Begin typing, then select from the list. - Select the transfer effective date. - Select the agent in your agency receiving the policies. Book of Business Transfer Requests 🏢 Agency Book of Business Transfer Request Selling Agency Name 🔍 Search Agencies... *Transfer Effective Date 📅 Receiving Agent Information: *Agent receiving policies Select an Agent ⌵ Next > Cancel Request

Continued on next page

Agency Tab, Continued

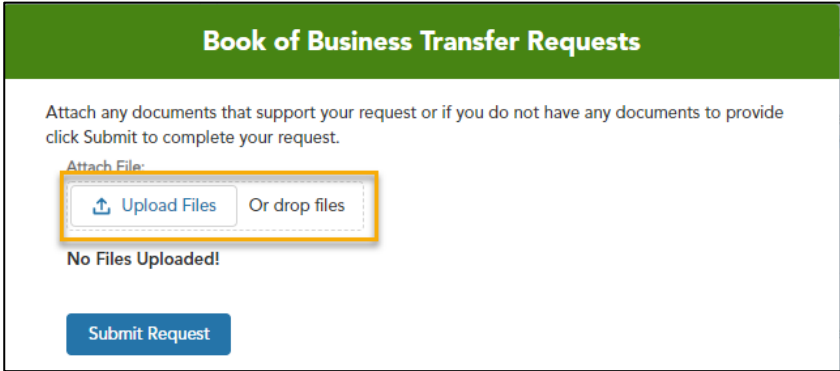
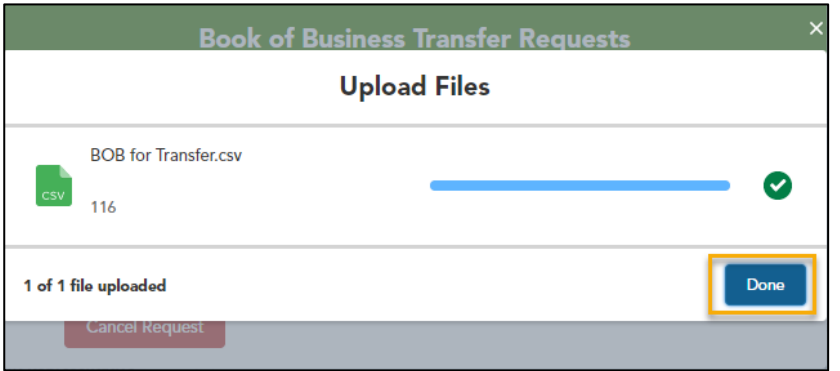
Request:
Buy, Sell,
Transfer,
continued

Step	Action
4, con't	If <i>Complete Agency Transfer (Buy / Sell)</i> is selected: A. Search agencies to locate selling agency's name. <i>Note:</i> Begin typing, then select from the list. B. Select the transfer effective date. C. Indicate the receiving agency by entering a valid agency name. <i>Note:</i> Begin typing, then select from the list. D. Enter the receiving agent's name and DFS license number. E. Enter any special instructions. Book of Business Transfer Requests ↔ Agency Book of Business Transfer Request Selling Agency Name Q Search Agencies... * Transfer Effective Date Receiving Agency Name Q Search Agencies... Receiving Agent Name Agent DFS License # Special Instructions Next > Cancel Request
5	Select Next to continue.

Continued on next page

Agency Tab, Continued

Request:
Buy, Sell,
Transfer,
continued

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

Continued on next page

Agency Tab, Continued

Request:
Buy, Sell,
Transfer,
continued

Step	Action						
8	Review the list of uploaded document(s). If needed, Upload additional files and/or delete a previously uploaded files. When complete, select Submit Request. Book of Business Transfer Requests 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. Attach File:  Upload Files Or drop files <table><tr><th>#</th><th>File Name</th><th>Actions</th></tr><tr><td>1)</td><td>BOB for Transfer</td><td>delete</td></tr></table> Submit Request Cancel Request Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.	#	File Name	Actions	1)	BOB for Transfer	delete
#	File Name	Actions					
1)	BOB for Transfer	delete					

Continued on next page

Agency Tab, Continued

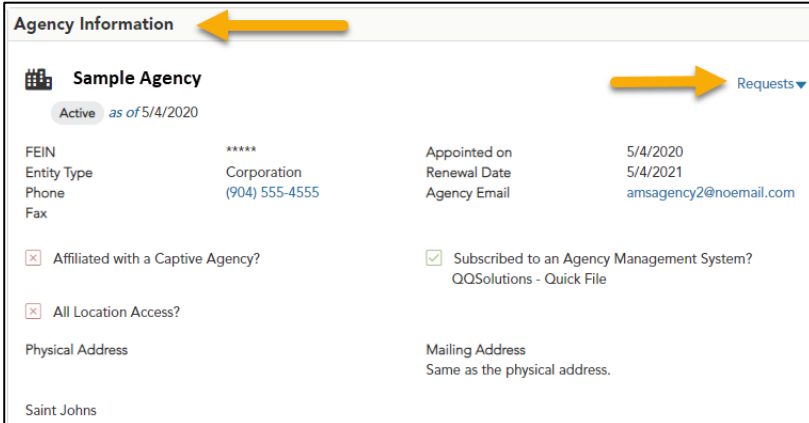
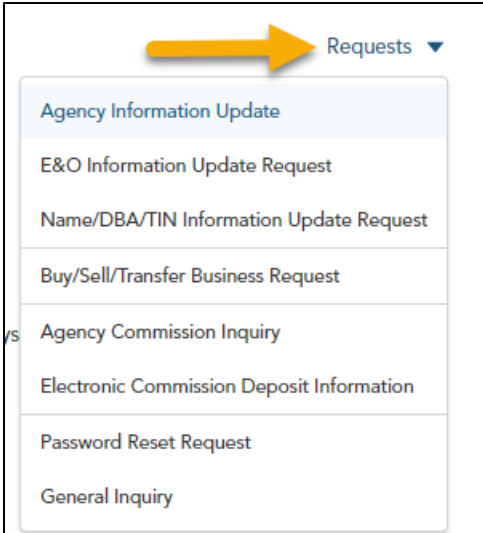
Request: Agency Commission Inquiry

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

Continued on next page

Agency Tab, Continued

Request:
Agency
Commission
Inquiry,
continued

Step	Action
3	Confirm the displayed email address, then select the appropriate action. Agency Commission Inquiry Email: amstrainingagency3@gmail.com Commission Inquiry Type: ☐ Stop Pay/Reissue Requests ☐ Commission Statements ☐ Policy Commission Inquiry Submit Request Cancel Request **Your request should be processed within 15 business days. An email will be sent to the Agency Principal when completed.
4	Result: Based on the selection, different screens will display. Complete the applicable fields. 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. Agency Commission Inquiry Email: amstrainingagency3@gmail.com Commission Inquiry Type: ☒ Stop Pay/Reissue Requests ☐ Commission Statements ☐ Policy Commission Inquiry Check Number: Date Of Check: Check Amount: Reason for Requesting Stop Pay: Submit Request Cancel Request **Your request should be processed within 15 business days. An email will be sent to the Agency Principal when completed. If requesting <i>Commission Statements</i>, complete the <i>Requested From Month, Year</i> and <i>Requested To Month, Year</i> fields shown below. Agency Commission Inquiry Email: amstrainingagency3@gmail.com Commission Inquiry Type: ☐ Stop Pay/Reissue Requests ☒ Commission Statements ☐ Policy Commission Inquiry Requested From Month, Year: Requested To Month, Year: Submit Request Cancel Request **Your request should be processed within 15 business days. An email will be sent to the Agency Principal when completed.

Continued on next page

Agency Tab, Continued

Request:
Agency
Commission
Inquiry,
continued

Step	Action
4, con't	If submitting a <i>Policy Commission Inquiry</i>, enter the policy number and reason for inquiry. Agency Commission Inquiry Email: amstrainingagency3@gmail.com Commission Inquiry Type: ☐ Stop Pay/Reissue Requests ☐ Commission Statements ☒ Policy Commission Inquiry Policy Number: Reason for Inquiry: Submit Request Cancel Request **Your request should be processed within 15 business days. An email will be sent to the Agency Principal when completed.
5	Select Submit Request. Submit Request Cancel Request 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

Agency Tab, Continued

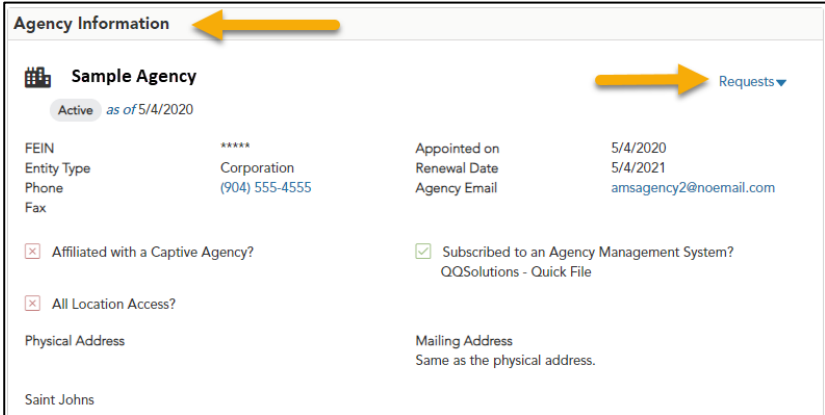
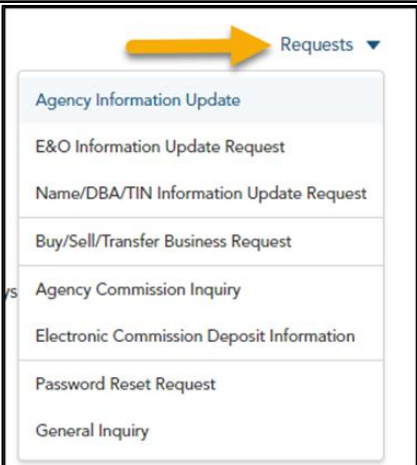
Request: Electronic Payment Information Update

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

Continued on next page

Agency Tab, Continued

Request:
Electronic
Payment
Information
Update,
continued

Step	Action
3	If necessary, update the <i>Banking information</i>, select the <i>Acknowledgement Statement</i>, then click Accept. Electronic Commission Deposit Information ACG SOUTH INSURANCE AGENCY- Testing FFIN: *****6230 Bank Routing Number: 063100277 Bank Account Number: 1254123 Bank Account Type: Checking 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. To review the Terms and Conditions, click here. ☒ I acknowledge that I have reviewed the Terms and Conditions of this Direct Deposit Authorization and that I agree to the same 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. Accept Cancel • Acknowledge the direct deposit authorization in order to submit the request.

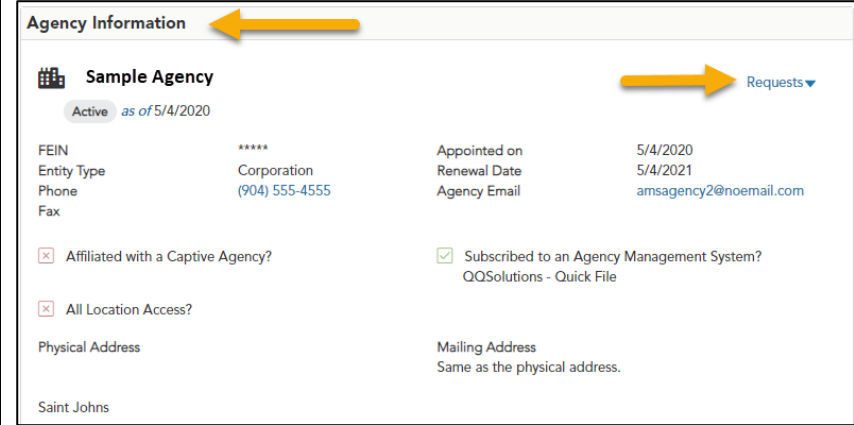
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Agency Tab, Continued

Request: Password Reset

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

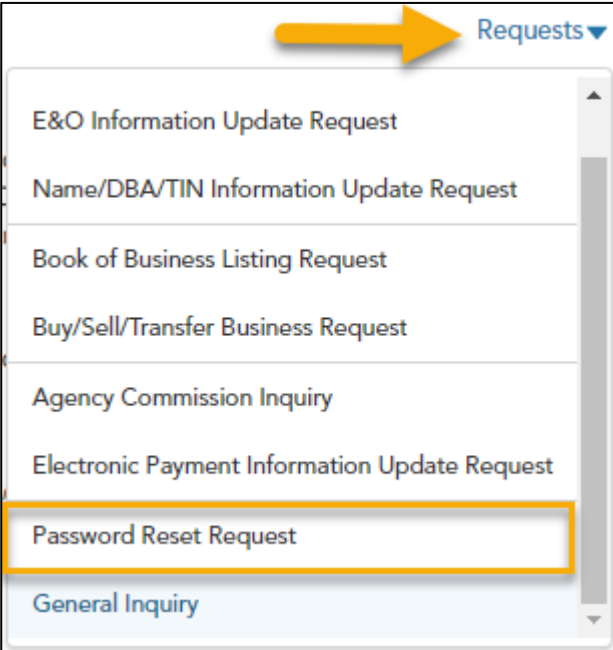
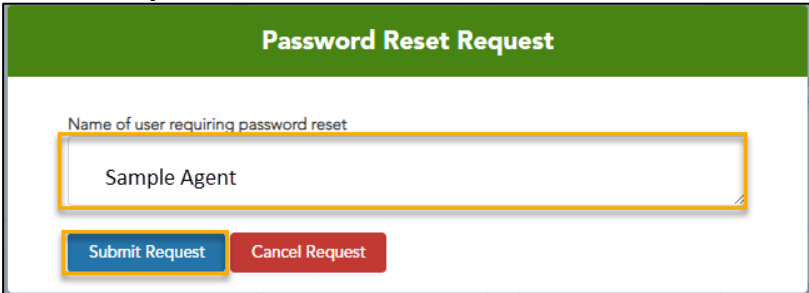
To submit a password reset request:

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

Continued on next page

Agency Tab, Continued

Request:
Password
Reset,
continued

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

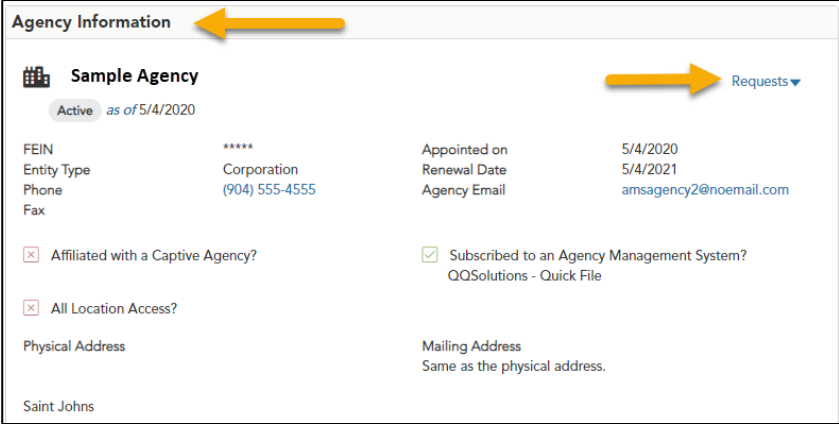
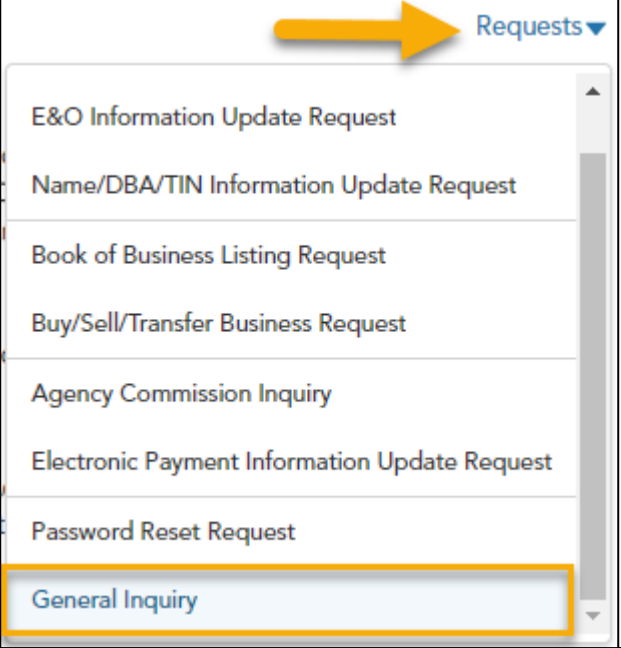
Continued on next page

Agency Tab, Continued

Request:

General Inquiry

To submit a *General Inquiry* request:

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

Continued on next page

Agency Tab, Continued

Request:
General Inquiry,
continued

Step	Action
3	Enter the details of your inquiry, then select Next. General Inquiry Inquiry Details: Next > Cancel Request
4	Upload any documents that support your request or if you do not have any documents to provide select Submit Request to complete your request. General Inquiry Attach any documents that support your request or if you do not have any documents to provide click Submit to complete your request. Attach File: Upload Files Or drop files No Files Uploaded! Submit Request Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.

Appointment Renewals

Appointment Renewal Overview

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

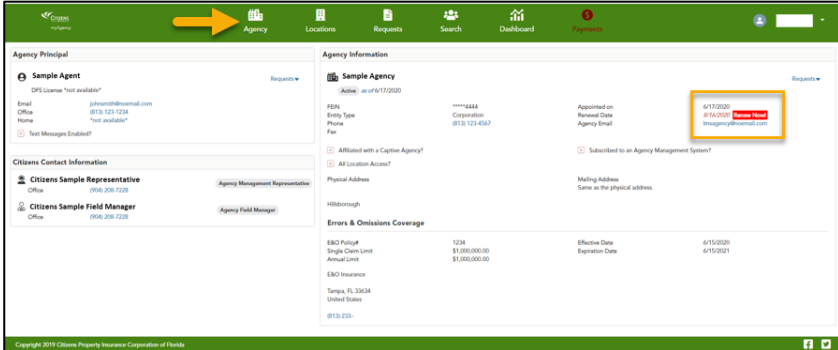
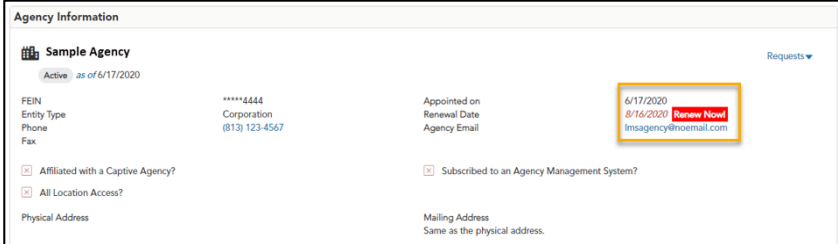
Processing Appointment Renewals

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

Important Notes:

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

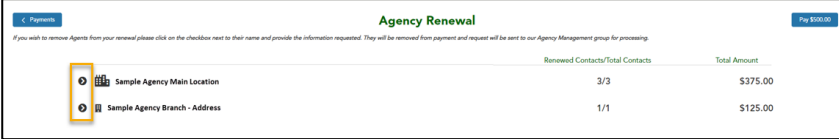
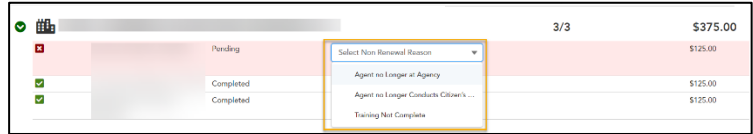
To process an agent/agency appointment renewal:

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

Continued on next page

Appointment Renewals, Continued

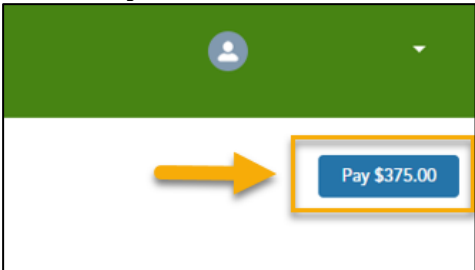
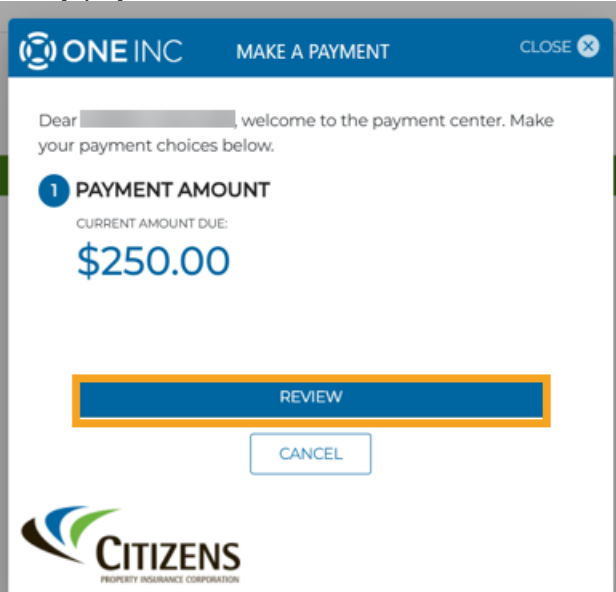
Processing Appointment Renewals, continued

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

Continued on next page

Appointment Renewals, Continued

Processing Appointment Renewals, continued

Step	Action
6	Select Pay.  Result: The <i>One-Time Payment</i> screen appears. Note: Fees for supplemental applications that are pending payment within 60 days of the renewal date will be included in the renewal balance.
7	Verify payment amount and select Review:  Result: The <i>One-Time Payment</i> screen appears.

Continued on next page

Appointment Renewals, Continued

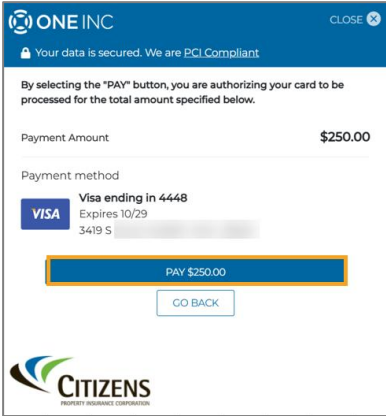
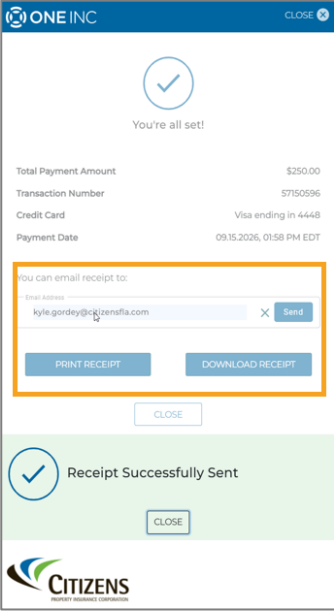
Processing
Appointment
Renewals,
continued

Step	Action
8	Enter payment information, then select Review: ONE INCADD NEW PAYMENT METHODCLOSE Your data is secured. We are PCI Compliant. VISAMasterCardAMERICAN EXPRESSDISCOVER Card Number **** * * * * VISA Expiration Date 10/29 CVV *** Name on card Billing Address 3419 S Billing Zip 33629 REVIEW GO BACK Result: The <i>Confirm Payment</i> screen will appear.

Continued on next page

Appointment Renewals, Continued

Processing Appointment Renewals, continued

Step	Action
9	Confirm payment amount and select Pay. 
10	The Payment Receipt will generate if processed successfully. 

Locations Tab

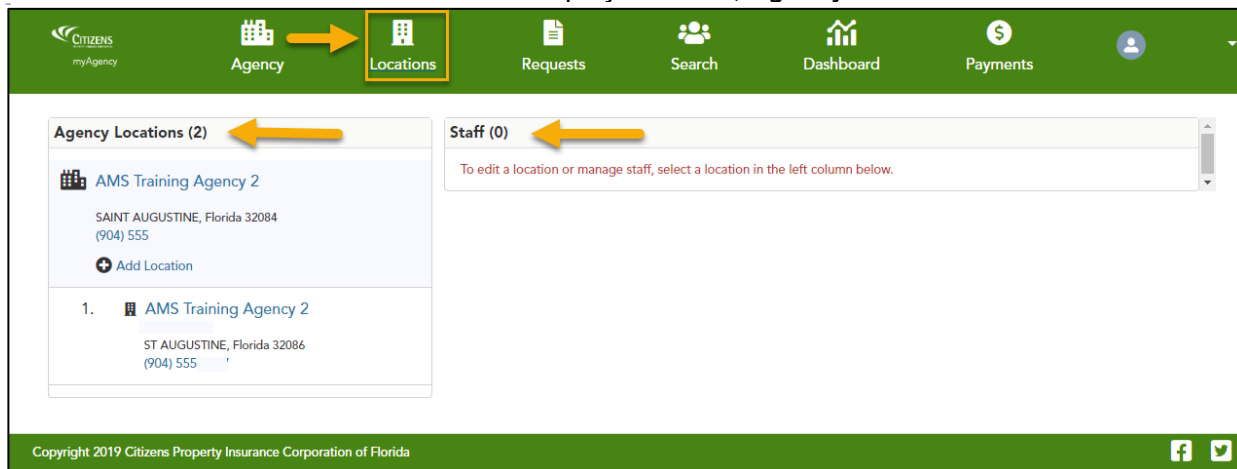
Functions Overview

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

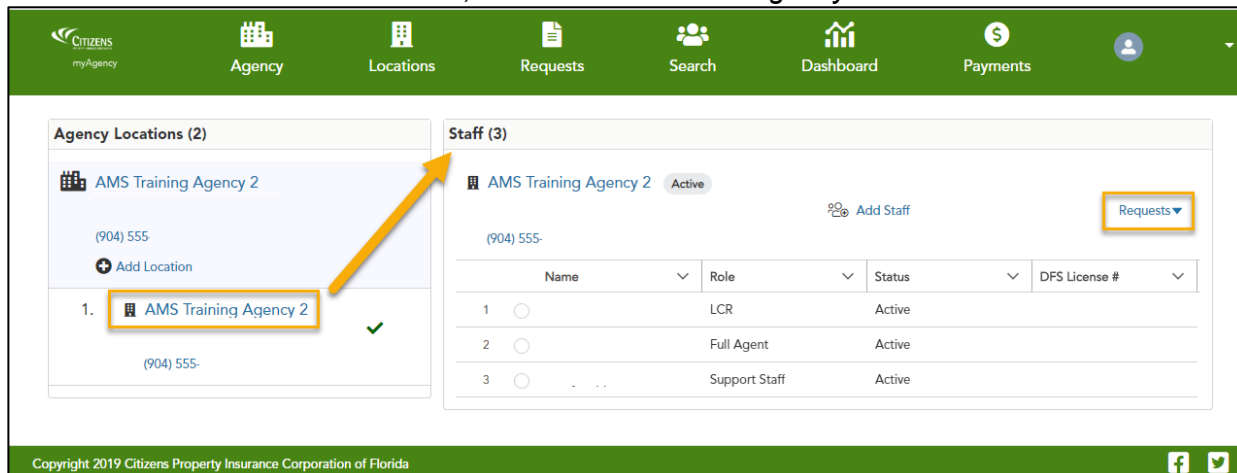
- View locations
- Add location
- Add staff
- Update staff information
- Transfer staff to a new location
- Update an agent's line of authority
- Remove staff

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*.



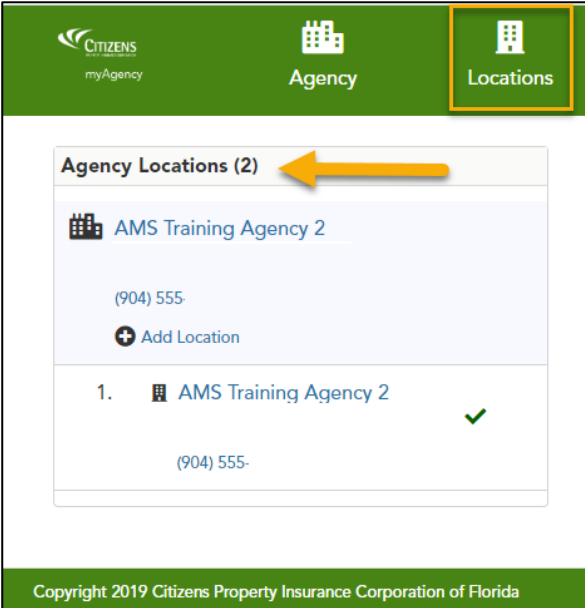
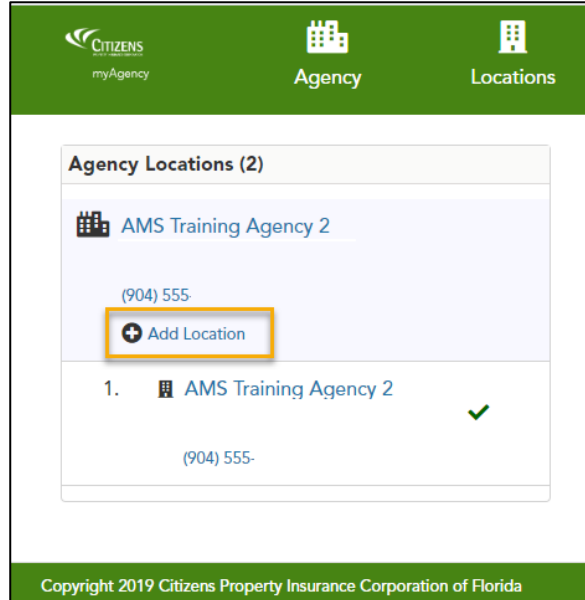
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Locations Tab, Continued

Supplemental Application: Add Location

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

If a new location needs to be added:

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

Continued on next page

Locations Tab, Continued

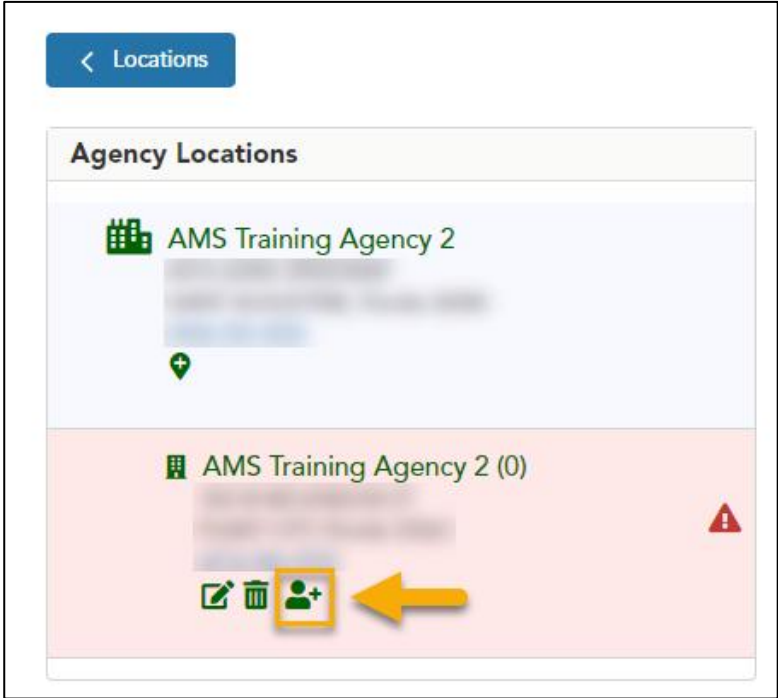
Supplemental Application: Add Location, continued

Step	Action
3	Complete all required fields. Supplemental Application Submit Request Cancel Request Add Location * Phone Fax Physical Address * Physical Street * Physical City * Physical State Select an Option * Physical Zip Mailing Address ☒ Is Mailing Address Same as Physical Address? Validate Address Clear
4	Select Validate Address. Validate Address Clear Result: The address is validated and standardized.
5	To add an additional location, select Add Location. Repeat Step 3 above. Add Location Clear Addresses validated and standardized. Result: The new location appears on the <i>Agency Locations</i> tile.

Continued on next page

Locations Tab, Continued

Supplemental
Application:
Add Location,
continued

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

Continued on next page

Locations Tab, Continued

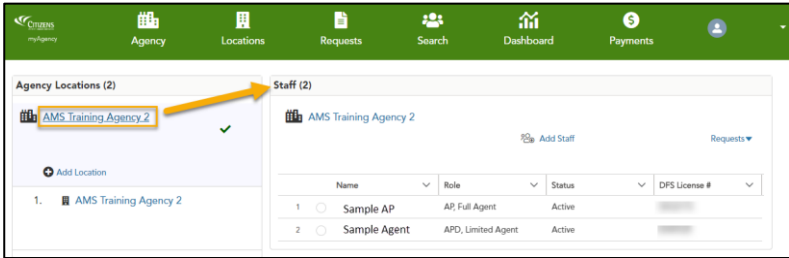
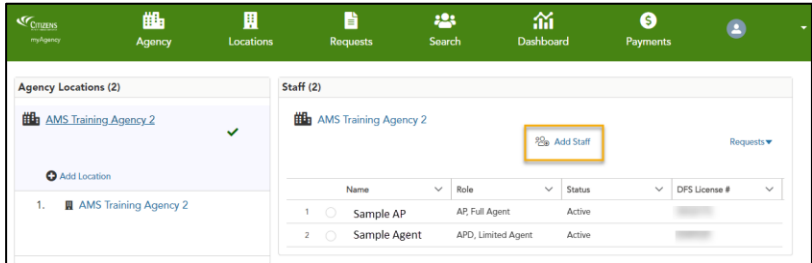
Supplemental Application: Add Staff Overview

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

Continued on next page

Locations Tab, Continued

Supplemental Application: Add Staff Overview, continued

Step	Action												
3	The <i>Supplemental Application</i> screen is dynamic, and additional fields will appear based on the information entered. Supplemental Application Submit Request Cancel Request Add Staff AMS Training Agency 2 Active Does the staff member have a DFS License Number? Personal Information * First Name * Last Name * Social Security Number * Birthdate Contact Information * Office Phone Office Phone Extension Mobile Phone Can Receive Text Messages? Fax * Email Additional Information Is Agency Principal Designee? Is Support Staff? Add Staff Clear To add staff, refer to the appropriate section below: <table> <tr> <th>If adding a:</th><th>Then see:</th></tr> <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> </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												

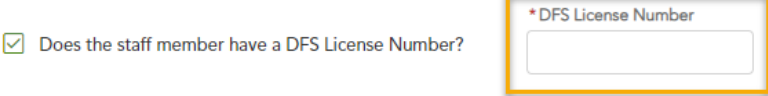
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Locations Tab, Continued

Add Staff: Fully Appointed Agent

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

After accessing the [Supplemental Application Add Staff](#) screen, add a fully appointed agent following the steps below:

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

Continued on next page

Add Staff:
Fully
Appointed
Agent,
continued

Continued on next page

Locations Tab, Continued

Add Staff: Fully Appointed Agent, continued

Step	Action
5	Select the red X to indicate that the agent can write new business. Additional Information ☐ Is Agency Principal Designee? ☐ Can the staff member write new business? Add StaffClear Result: The red X will change to a green check mark. Additional fields will appear.
6	Select the red X to indicate if the new agent will be an agent of record on policies written at the agency. Additional Information ☐ Is Agency Principal Designee? ☒ Can the staff member write new business? ☐ Will staff member be an Agent of Record on policies written by your agency? Add StaffClear 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. Result: The red X will change to a green check mark. Lines of authority will appear.
7	Indicate the agent's line of authority by selecting the red X next to the applicable line. ☒ Will staff member be an Agent of Record on policies written by your agency? Lines of Authority: ☒ Personal Residential LOA ☐ Commercial Residential LOA ☐ Commercial Non Residential LOA Add StaffClear 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. Result: The red X will change to a green check mark.

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Locations Tab, Continued

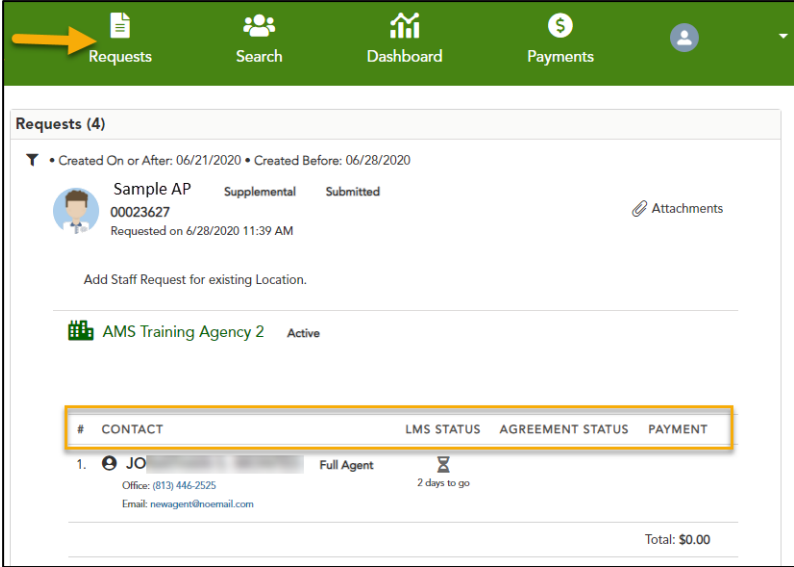
Add Staff: Fully Appointed Agent, continued

Step	Action
8	Select Add Staff. ☒ Will staff member be an Agent of Record on policies written by your agency? Lines of Authority: ☒ Personal Residential LOA ☒ Commercial Residential LOA ☒ Commercial Non Residential LOA Add Staff Clear 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. Results: The agent has been added to the request. A confirmation banner appears. ✓ Contact has been added to the request. Add remaining staff members before submitting the request. ✕ 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. < Locations Agency Locations AMS Training Agency 2 (1) 1) Full Agent Supplemental Application Add Staff AMS Training Agency 2 Active Does the staff member have a DFS License Number? Personal Information Submit Request Cancel Request
9	Select Submit Request. Supplemental Application Submit Request Cancel Request Add Staff AMS Training Agency 2 Active Result: The <i>Supplemental Application</i> has been submitted. A confirmation banner appears.

Continued on next page

Locations Tab, Continued

Add Staff:
Fully
Appointed
Agent,
continued

Step	Action
10	The <i>Requests</i> tab will display, with the <i>Supplemental Application</i> request to add staff listed. The newly requested agent's name, LMS, agreement, and payment status will display.  Results and Additional Actions: After a supplemental application is submitted, both full and limited agents must complete the following prior to appointment: - Sign and return the Agent Appointment Agreement within 15 days of receipt. - Complete Citizens-assigned New Agent Onboarding (NAO) modules, which will be assigned to them following the initial application submission. Required education will need to be completed within 30 days of assignment. - Submit a \$125 appointment fee for each agent appointed. Fees will be pro-rated for mid-term appointment and due within 15 days. This fee is due annually and can be paid through myAgency. - Fees for supplemental applications that are pending payment within 60 days of the renewal date will be included in the renewal balance.

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.  Does the staff member have a DFS License Number? Result: The red X will change to a green check mark and the <i>DFS License Number</i> field displays.

Continued on next page

Locations Tab, Continued

Add Staff: Limited Agent, continued

Step	Action
2	Enter the DFS license number. ☒ Does the staff member have a DFS License Number? * DFS License Number Result: Appointed license type and personal information, such as name, Social Security number and birthdate, are pulled from DFS records, and the applicable fields are gray and prefilled.
3	Enter other contact information. ☒ Does the staff member have a DFS License Number? * DFS License Number Appointed License Type 0220 Personal Information * First Name * Last Name * Social Security Number XXX-XX-XXXX * Birthdate Contact Information * Office Phone Office Phone Extension Mobile Phone Fax * Email ☒ Can Receive Text Messages?
4	Indicate if the agent is the agency principal designee by selecting the red X. Additional Information ☒ Is Agency Principal Designee? ☒ Can the staff member write new business? Add Staff Clear If yes, review and select Confirm. Acknowledgement 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. Confirm Close

Continued on next page

Locations Tab, Continued

Add Staff:
Limited
Agent,
continued

Step	Action
5	Select the red X to indicate that the limited agent can write new business on behalf of a fully appointed agent. Additional Information ☐ Is Agency Principal Designee? ☐ Can the staff member write new business? Add Staff Clear Result: The red X will change to a green check. Additional fields will appear.
6	Important: To request appointment for a limited agent, do not select <i>Will staff member be an Agent of Record on policies written by your agency?</i> Additional Information ☐ Is Agency Principal Designee? ☒ Can the staff member write new business? ☐ Will staff member be an Agent of Record on policies written by your agency? Add Staff Clear 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.

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Locations Tab, Continued

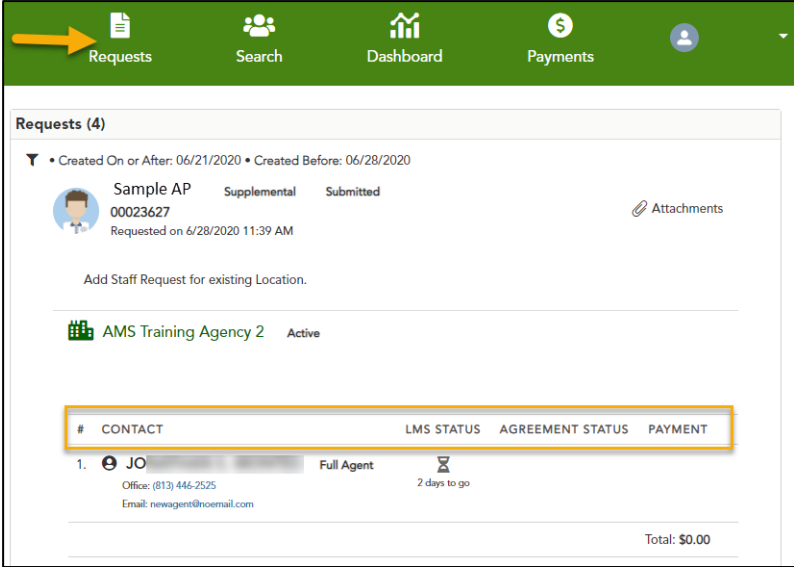
Add Staff: Limited Agent, continued

Step	Action
7	Select Add Staff. Additional Information ☒ Is Agency Principal Designee? ☒ Can the staff member write new business? ☒ Will staff member be an Agent of Record on policies written by your agency? Add Staff Clear 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. Results: - The agent has been added to the request. A confirmation banner appears. ✓ Contact has been added to the request. Add remaining staff members before submitting the request. ✕ - 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	Select Submit Request. Supplemental Application Submit Request Cancel Request Add Staff AMS Training Agency 2 Active Result: The <i>Supplemental Application</i> has been submitted. A confirmation banner appears.

Continued on next page

Locations Tab, Continued

Add Staff:
Limited
Agent,
continued

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

Continued on next page

Locations Tab, Continued

Add Staff: LCR Write and Service

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

- Write new business
- Services existing business

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

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

Step	Action
1	Select the red X next to the <i>Does the staff member have a DFS License Number?</i> question.  Does the staff member have a DFS License Number? Result: The red x turns to a green check mark and the <i>DFS License Number</i> field displays.
2	Enter the DFS license number. ☒ Does the staff member have a DFS License Number? *DFS License Number Result: Appointed license type and personal information, such as name, Social Security number and birthdate, are pulled from DFS records, and the applicable fields are gray and prefilled.
3	Enter other contact information. Add Staff AMS Training Agency 2 Active 4010 LEWIS SPEEDWAY SAINT AUGUSTINE, Florida 32084 (904) 555-4555 ☒ Does the staff member have a DFS License Number? *DFS License Number Appointed License Type 0440 Personal Information *First Name *Last Name *Social Security Number XXX-XX-XXX2 *Birthdate Contact Information *Office Phone Office Phone Extension Mobile Phone Fax *Email ☒ Can Receive Text Messages?

Continued on next page

Locations Tab, Continued

Add Staff: LCR Write and Service, continued

Step	Action
4	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> Additional Information ☐ Is Agency Principal Designee? ☒ Can the staff member write new business? ☐ Can the staff member service all locations? Result: The red X changes to a green check mark and the option for <i>Can the staff member service all locations?</i> disappears.
5	Select Add Staff. ☒ Will staff member be an Agent of Record on policies written by your agency? Lines of Authority: ☒ Personal Residential LOA ☐ Commercial Residential LOA ☐ Commercial Non Residential LOA Add Staff Clear 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. Results: - The LCR has been added to the request. A confirmation banner appears. ☒ Contact has been added to the request. Add remaining staff members before submitting the request. ☐ - 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. Locations Agency Locations AMS Training Agency 2 (1) 1) Full Agent Edit Staff Supplemental Application Submit Request Cancel Request Add Staff AMS Training Agency 2 Active Does the staff member have a DFS License Number? Personal Information

Continued on next page

Locations Tab, Continued

Add Staff:
LCR Write
and Service,
continued

Step	Action
6	Select Submit Request. Supplemental Application Submit Request Cancel Request Add Staff AMS Training Agency 2 Active Result: The Supplemental Application has been submitted. A confirmation banner appears.
7	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.

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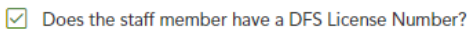
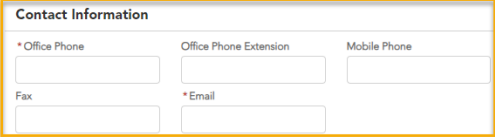
Locations Tab, Continued

Add Staff: Service-Only LCR

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

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

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

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

Continued on next page

Locations Tab, Continued

Add Staff:
Service-Only
LCR,
continued

Step	Action
4	Select the red X next to <i>Can the staff member service all locations?</i> Additional Information ☒ Is Agency Principal Designee? ☒ Can the staff member write new business? ☒ Can the staff member service all locations? Add Staff Clear

Continued on next page

Locations Tab, Continued

Add Staff: Service-Only LCR, continued

Step	Action
5	Select Add Staff. Additional Information ☐ Is Agency Principal Designee? ☒ Can the staff member service all locations? Add StaffClear Results: - The Service-Only LCR has been added to the request. A confirmation banner appears. ✓ Contact has been added to the request. ✕ Add remaining staff members before submitting the request. - 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. < Locations Supplemental Application Submit RequestCancel Request Agency Locations AMS Training Agency 2 (1) Full Agent Edit Staff Add Staff AMS Training Agency 2Active Does the staff member have a DFS License Number? Personal Information

Continued on next page

Locations Tab, Continued

Add Staff:
Service-Only
LCR,
continued

Step	Action
6	Select Submit Request. Supplemental Application Submit Request Cancel Request Add Staff AMS Training Agency 2 Active Result: The Supplemental Application has been submitted. A confirmation banner appears.
7	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.

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	Important: Do not select the red X next to the <i>Does the staff member have a DFS License Number?</i> question.  Does the staff member have a DFS License Number?
2	Enter personal and contact information. Add Staff AMS Training Agency 2 Active Does the staff member have a DFS License Number? Personal Information * First Name * Last Name * Social Security Number * Birthdate Contact Information * Office Phone Office Phone Extension Mobile Phone Can Receive Text Messages? Fax * Email Additional Information Is Agency Principal Designee? Is Support Staff? Add Staff Clear

Continued on next page

Locations Tab, Continued

Add Staff:
View-Only
Support,
continued

Step	Action
3	Select the red X next to <i>Is Support Staff?</i> Additional Information Is Agency Principal Designee? Is Support Staff? Add Staff Clear
4	Select Add Staff. Additional Information Is Agency Principal Designee? Can the staff member service all locations? Add Staff Clear Results: - The newly added support staff has been added to the request. A confirmation banner appears. ✓ Contact has been added to the request. Add remaining staff members before submitting the request. ✕ - 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. Locations AMS Training Agency 2 (1) Full Agent Edit Staff Supplemental Application AMS Training Agency 2 Active Does the staff member have a DFS License Number? Personal Information

Continued on next page

Locations Tab, Continued

Add Staff:
View-Only
Support,
continued

Step	Action
5	Select Submit Request. Supplemental Application Submit Request Cancel Request Add Staff AMS Training Agency 2 Active Result: The Supplemental Application has been submitted. A confirmation banner appears.
6	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.

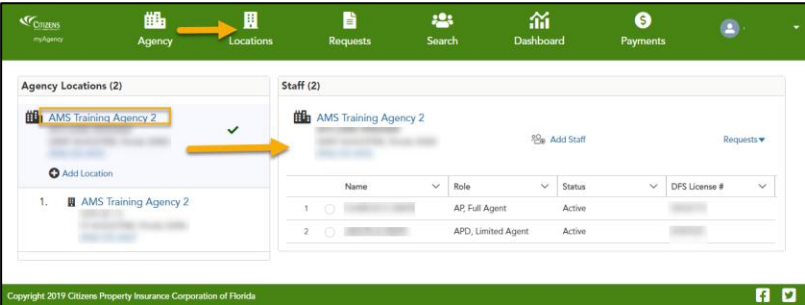
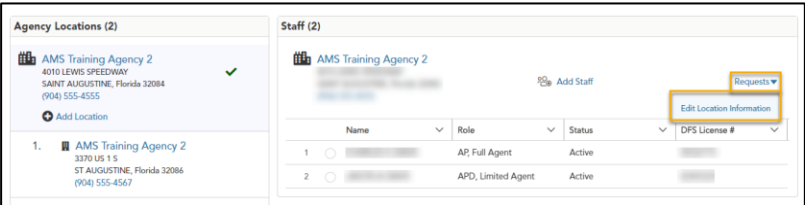
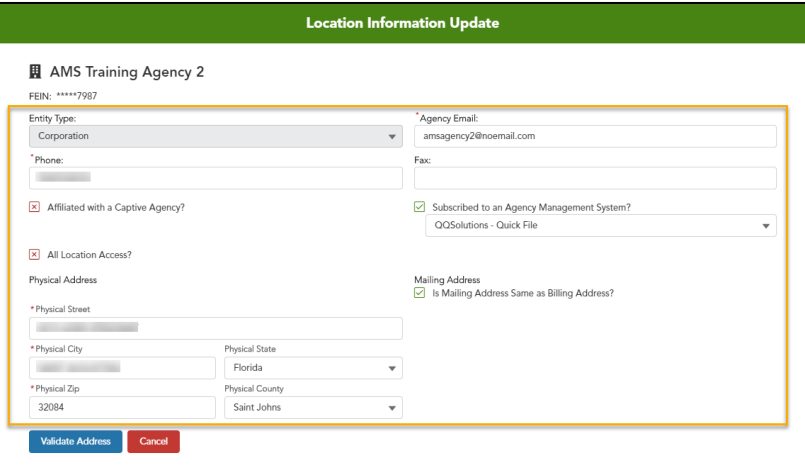
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Locations Tab, Continued

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

Continued on next page

Locations Tab, Continued

Request: Edit Agency Location Information, continued

Step	Action
4	Select Validate Address. Location Information Update AMS Training Agency 2 FEIN: *****7987 Entity Type: Corporation Phone: ☒ Affiliated with a Captive Agency? ☒ Subscribed to an Agency Management System? Agency Email: amsagency2@noemail.com Fax: QQSolutions - Quick File Physical Address * Physical Street * Physical City * Physical Zip Physical State Physical County Mailing Address ☒ Is Mailing Address Same as Billing Address? Validate Address Cancel Result: Address is validated and standardized.
5	Select Save. Save Cancel Addresses validated and standardized. Result: A confirmation banner will display, and the status of the request can be viewed on the <i>Requests</i> tab.

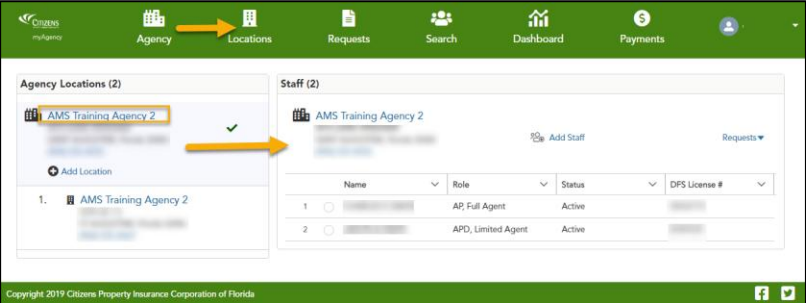
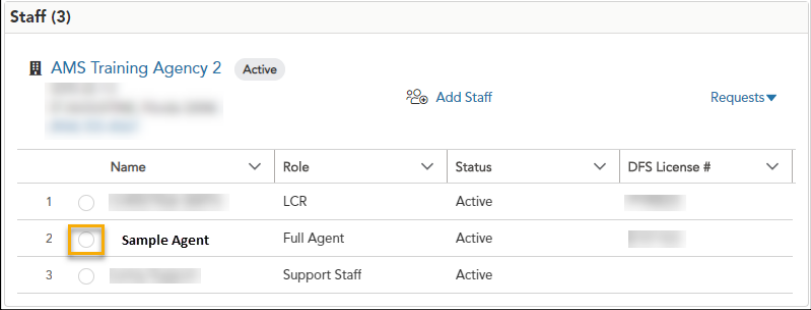
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Locations Tab, Continued

Request: Staff Information Change

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

To update staff information:

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

Continued on next page

Locations Tab, Continued

Request:
Staff
Information
Change,
continued

Step	Action
3	Select the Requests drop-down menu, then Staff Information Change Request. Staff Member Details Sample Agent Full Agent Active as of 5/4/2020 kelly.agent@noemail.com (904) 777-7777 Personal Details Date of Birth SSN XXX-XX- Mobile Fax (123) 444-4444 Appointment Details DFS License # License Type 0220 Appointment Date AMS Role Full Agent Training Status Completed Document Signed? Can write new business? Can service all locations? Is the AOR? Lines of Authority: Personal Residential LOA Commercial Residential LOA Commercial Non Residential LOA Requests Staff Information Change Request Transfer Staff to a New Location Update Line of Authority Remove Staff Result: The <i>Staff Information Change Request</i> screen displays.
4	Complete necessary edits. Staff Information Change Request Any name changes will require supporting documentation in order to submit the request. To change locations, select from a list of existing locations below. Change Location Location Phone Location Phone First Name Sample Office Phone 9047777777 Fax 1234444444 Email kelly.agent@noemail.com Last Name Agent Extension Submit Cancel Request

Continued on next page

Locations Tab, Continued

Request:
Staff
Information
Change,
continued

Step	Action
5	Select Submit. Staff Information Change Request Any name changes will require supporting documentation in order to submit the request. To change locations, select from a list of existing locations below. * Change Location Location Phone * First Name Sample * Office Phone 9047777777 Fax 1234444444 * Email kelly.agent@noemail.com * Last Name Agent Extension Submit Cancel Request 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

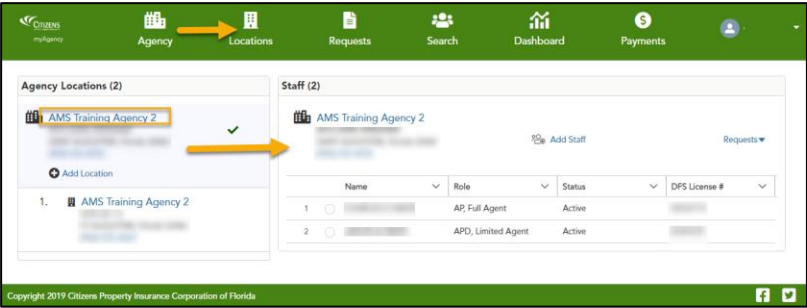
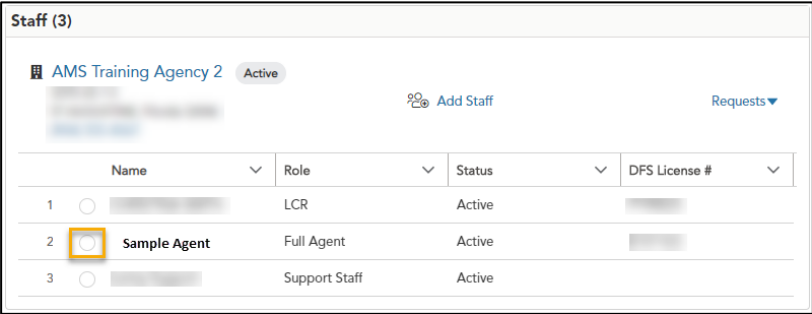
Locations Tab, Continued

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

Continued on next page

Locations Tab, Continued

Request:
Transfer Staff
to a New
Location,
continued

Step	Action
3	Select the Requests drop-down menu, then Transfer Staff to New Location. Staff Member Details Sample Agent Full Agent Active as of 5/4/2020 kelly.agent@noemail.com (904) 777-7777 Personal Details Date of Birth SSN XXX-XX- Mobile Fax (123) 444-4444 Appointment Details DFS License # License Type 0220 Appointment Date AMS Role Full Agent Document Signed? Training Status Completed Can write new business? Can service all locations? Is the AOR? Lines of Authority: Personal Residential LOA Commercial Residential LOA Commercial Non Residential LOA Requests Staff Information Change Request Transfer Staff to a New Location Update Line of Authority Remove Staff
	Result: The <i>Transfer Staff to a New Location</i> screen displays.
4	Complete required fields. Transfer Staff to a New Location Sample Agent Phone Fax Physical Address Physical Street Physical City Physical State Physical Zip Mailing Address Is Mailing Address Same as Physical Address? Validate Address Clear Cancel Request Please note this user is the only Full Agent at the Location. The Location will be deactivated if the only Full Agent is removed.

Continued on next page

Locations Tab, Continued

Request:
Transfer Staff
to a New
Location,
continued

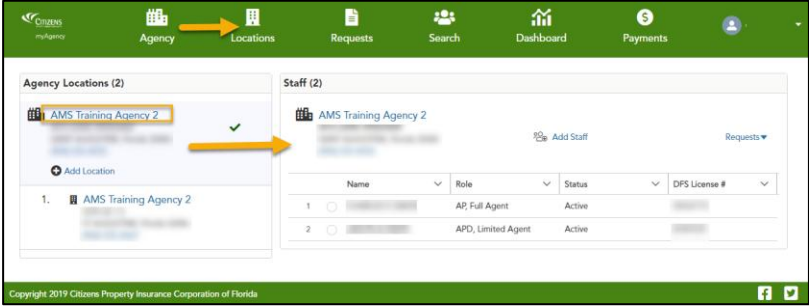
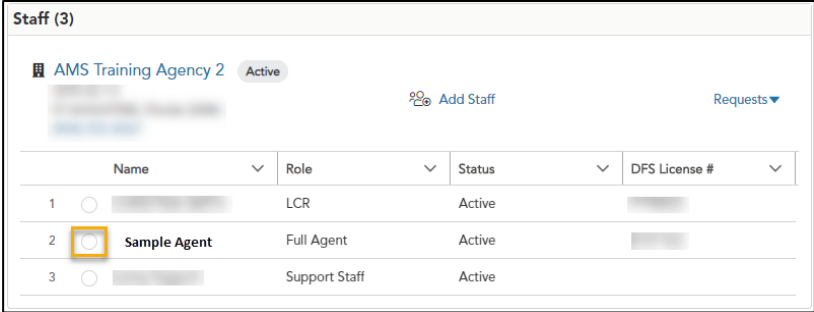
Step	Action
5	Select Validate Address. Validate Address Clear Cancel Request Result: Address is validated and standardized.
6	Select Add Location. Add Location Clear Cancel Request Addresses validated and standardized. Result: A confirmation banner will display, and the status of the request can be viewed 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	Access the <i>Locations</i> tab, then selecting the blue hyperlink to expand the agent's location.  Result: That location's <i>Staff</i> tile expands.
2	Select the radio button next to the staff name that requires updates.  Result: The <i>Staff Member Details</i> screen displays.

Continued on next page

Locations Tab, Continued

Request:
Update Line
of Authority,
continued

Step	Action
3	Select the Requests drop-down menu, then Update Line of Authority. Staff Member Details Sample Agent Full Agent Active as of 5/4/2020 kelly.agent@noemail.com (904) 777-7777 Personal Details Date of Birth SSN XXX-XX- Mobile Fax (123) 444-4444 Appointment Details DPS License # License Type 0220 Appointment Date AMS Role Full Agent Document Signed? Training Status Completed Can write new business? Can service all locations? Is the AOR? Lines of Authority: Personal Residential LOA Commercial Residential LOA Commercial Non Residential LOA Requests Staff Information Change Request Transfer Staff to a New Location Update Line of Authority Remove Staff
	Result: The <i>Update Line of Authority</i> screen displays.

Continued on next page

Locations Tab, Continued

Request:
Update Line
of Authority,
continued

Step	Action
4	A green check mark indicates the agent's current line of authority. - To add an additional line, select the red X. Update Line of Authority Sample Agent Lines of Authority can be selected or deselected based on the agent's eligibility. DFS License # License Type 0220 Lines of Authority ☒ Personal Residential ☐ Commercial Residential ☐ Commercial Non-Residential Additional Details Submit Cancel Request - To remove a line of authority, select the green check mark. Update Line of Authority Sample Agent Lines of Authority can be selected or deselected based on the agent's eligibility. DFS License # License Type 0220 Lines of Authority ☒ Personal Residential ☐ Commercial Residential ☐ Commercial Non-Residential Additional Details Submit Cancel Request

Continued on next page

Locations Tab, Continued

Request:
Update Line
of Authority,
continued

Step	Action
5	Add any additional details, then select Submit. Update Line of Authority Sample Agent Lines of Authority can be selected or deselected based on the agent's eligibility. DFS License # License Type0220 Lines of Authority ☒Personal Residential ☐Commercial Residential ☐Commercial Non-Residential Additional Details Submit Cancel Request 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

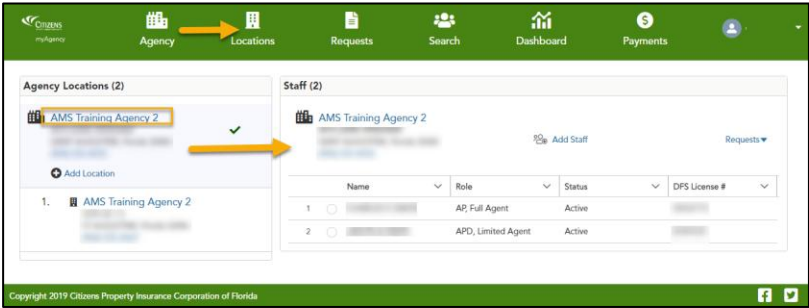
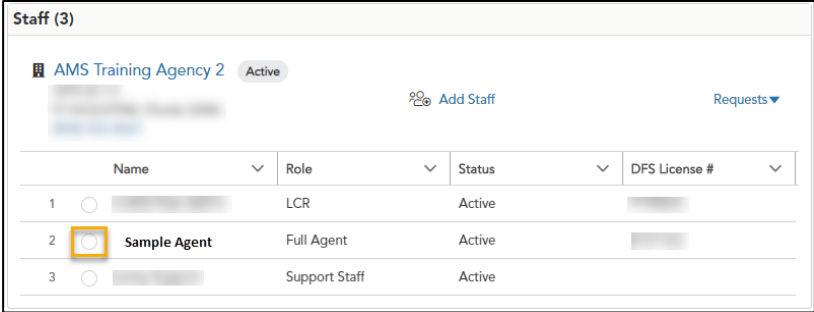
Locations Tab, Continued

Request:

Remove Staff

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

To submit a *Remove Staff* request:

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

Continued on next page

Locations Tab, Continued

Request:
Remove Staff,
continued

Step	Action
3	Select the Requests drop-down menu, then Remove Staff. Staff Member Details Sample Agent Full Agent Activeas of 5/4/2020 kelly.agent@noemail.com (904) 777-7777 Personal Details Date of Birth SSN XXX-XX- Mobile Fax (123) 444-4444 Appointment Details DPS License # License Type0220 AMS RoleFull Agent ☒ Document Signed? Training StatusCompleted ☒ Can write new business? ☒ Can service all locations? ☒ Is the AOR? Lines of Authority: ☒ Personal Residential LOA ☒ Commercial Residential LOA ☒ Commercial Non Residential LOA Requests Staff Information Change Request Transfer Staff to a New Location Update Line of Authority Remove Staff Result: The <i>Remove Staff</i> screen displays.

Continued on next page

Locations Tab, Continued

Request:
Remove Staff,
continued

Step	Action
4	The Remove Staff screen will vary based on role of the staff member being removed: If the staff member being removed is a fully appointed agent, their book of business must be transferred. Indicate the Transfer Effective Date, then select the Agent receiving policies. Remove Staff ↔ Transfer Book of Business The Agent's Book of Business should be transferred to another Agent before deactivation. Agent who you are transferring policies from Sample Agent * Transfer Effective Date Receiving Agent Information: * Agent receiving policies Select Agent Submit Cancel Request Please note this user is the only Full Agent at the Location. The Location will be deactivated if the only Full Agent is removed. If the staff member being removed does not have a book of business, continue to Step 5. Remove Staff Support Additional Details Submit Cancel Request

Continued on next page

Locations Tab, Continued

Request:
Remove Staff,
continued

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

Requests Tab

Overview

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

Each request record includes, if applicable:

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

CITIZENS myAgency

Agency

Locations

Requests

Search

Dashboard

Payments

CHARLES ...

Request Filters

Request Number

Request Type

Select an Option

Request Status

Select an Option

Created In

In last 7 days

Filter Requests

Reset

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

Assigned Representative

Attachments

Uploaded Documents

Action Requested

Add Staff Request for existing Location.

AMS Training Agency 2

Active

#

CONTACT

LMS STATUS

AGREEMENT STATUS

PAYMENT

1.

Office: (813) 446-2525

Email: newagent@noemail.com

Full Agent

2 days to go

Total: \$0.00

Continued on next page

Citizens Property Insurance Corporation 10.12.2026

Back to

Table of Contents

or

Site Map

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Requests Tab, Continued

Filtering Requests

- The *Requests* list can be filtered by:
- Request Number
 - Request Type
 - Request Status
 - Date range for submitted requests

To sort the requests list:

Step	Action
1	Select the appropriate Request Filters using the and drop-down menus. Request Filters Request Number Request Type Select an Option Request Status Select an Option Created In In last 7 days Filter Requests Reset

Continued on next page

Requests Tab, Continued

Filtering Requests, continued

Step	Action
2	Select Filter Requests. Request Filters Request Number Request Type Select an Option Request Status Select an Option Created In In last 7 days Filter Requests Reset Result: A list of filtered requests display.

Overview

- Name
- Appointment type
- Status

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

CITIZENS
myAgency

Agency Locations Requests **Search** Dashboard Payments

Contact Filters

First Name

Last Name

Appointment Type
Select an Option

Status
Select an Option

Filter Contacts **Reset**

Showing 1 to 13 of 13 records.

< First < Previous Next > Last >

▼ Sample LCR @ Location 2

Sample LCR : LCR

Status

Submit staff requests

Requests

Contact Information

Personal Details

Date of Birth	Jun 2,	SSN	XXX-XX-3043
Mobile		Fax	

Appointment Details

DFS License #		
License Type	0440	Appointment Date
AMS Role	LCR	
☒ Document Signed?		Training Status

☒ Can write new business?
☒ Can service all locations?
☒ Is the AOR?

> **Sample Agent @ Location 1**

Continued on next page

Search Tab, Continued

Filtering

Search

Results

- Staff records can be filtered by:
- First and last name
 - Appointment type
 - Status
- To sort the *staff records list*:

Step	Action
1	Select the appropriate <i>Contact Filters</i> using the fields and drop-down menus. First Name Last Name Appointment Type Select an Option Status Select an Option Filter Contacts Reset

Continued on next page

Filtering Search Results, continued

Result: The list of filtered results display in the staff records list.

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:



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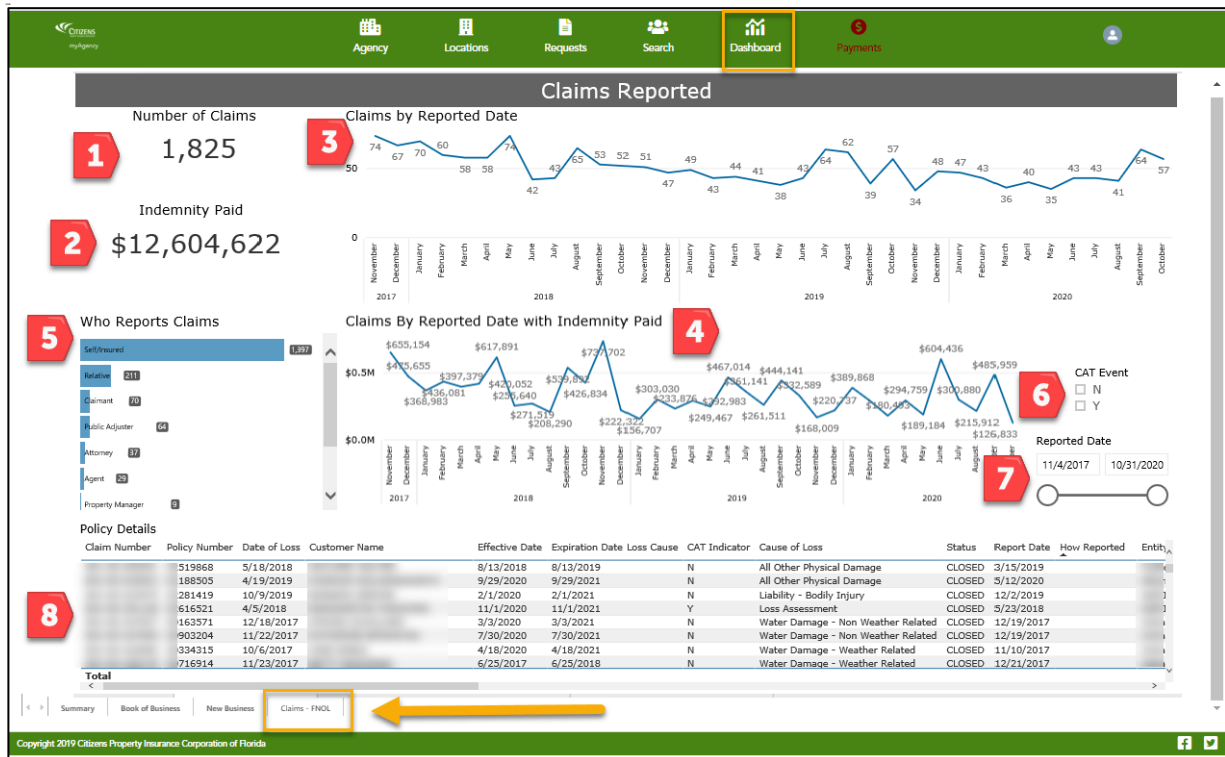
Dashboards Tab, Continued

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:



Continued on next page

Dashboard Tab, Continued

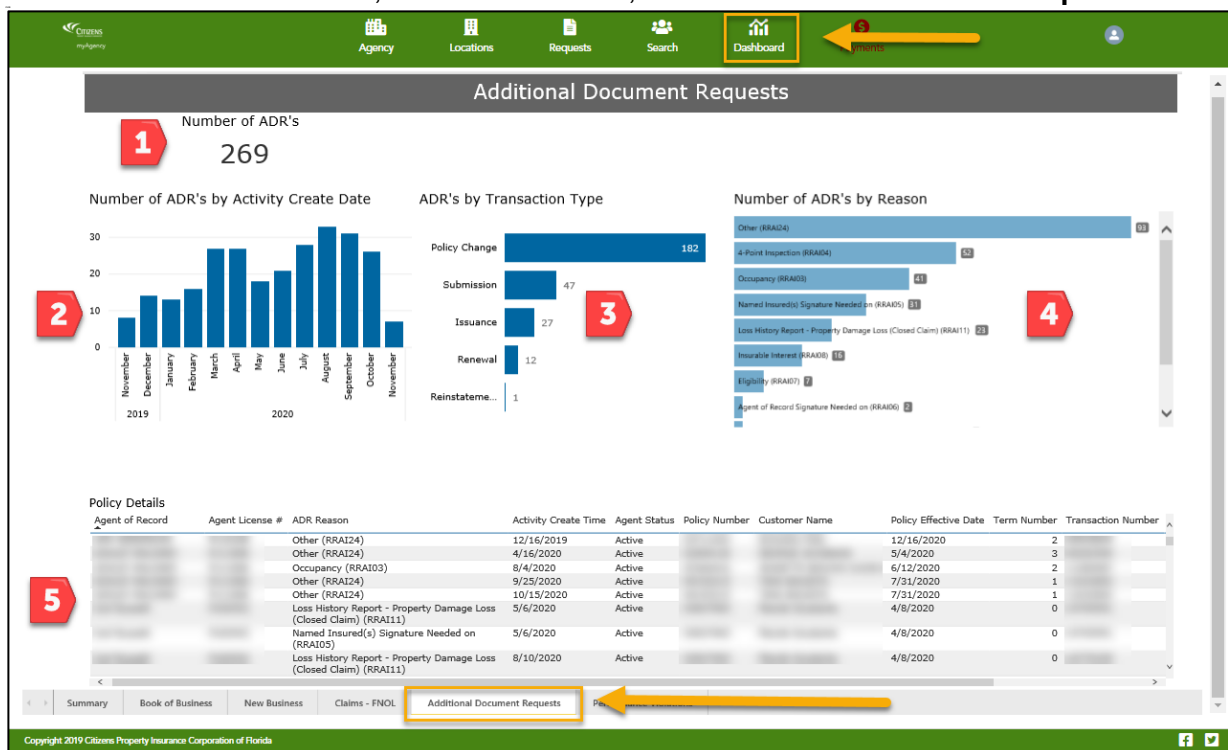
Additional Document Requests Tab

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**.



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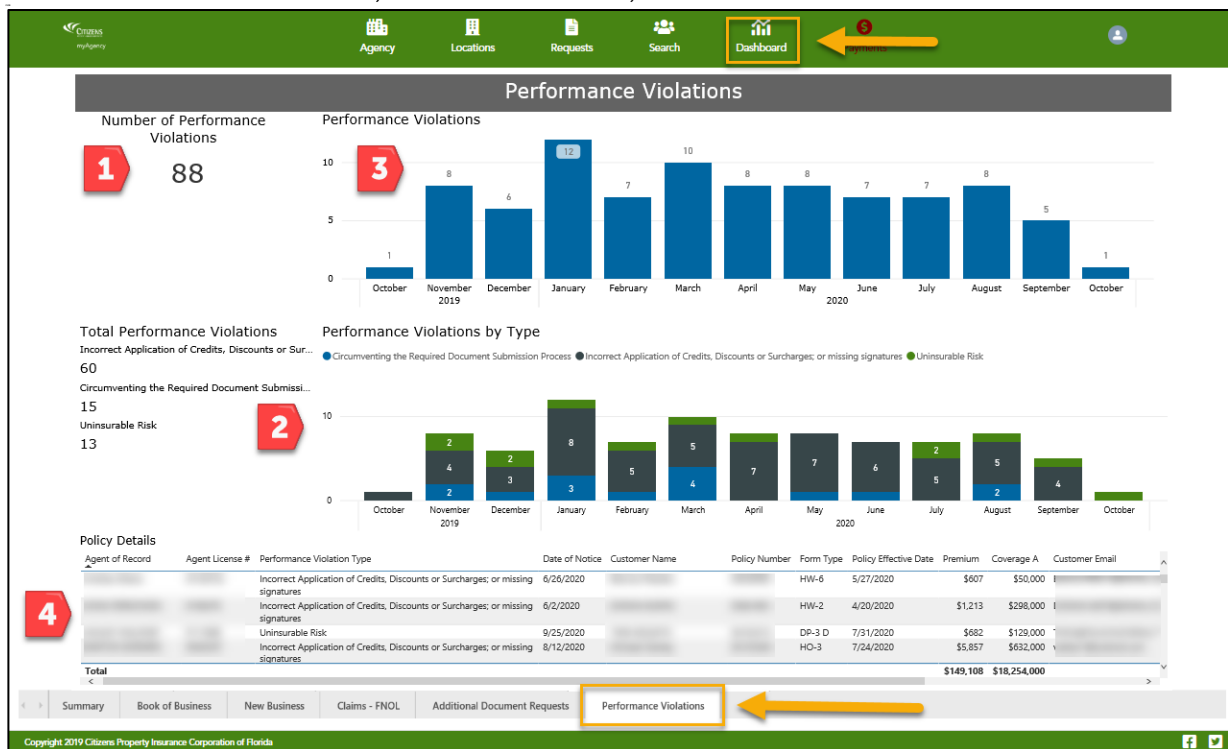
Dashboard Tab, Continued

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

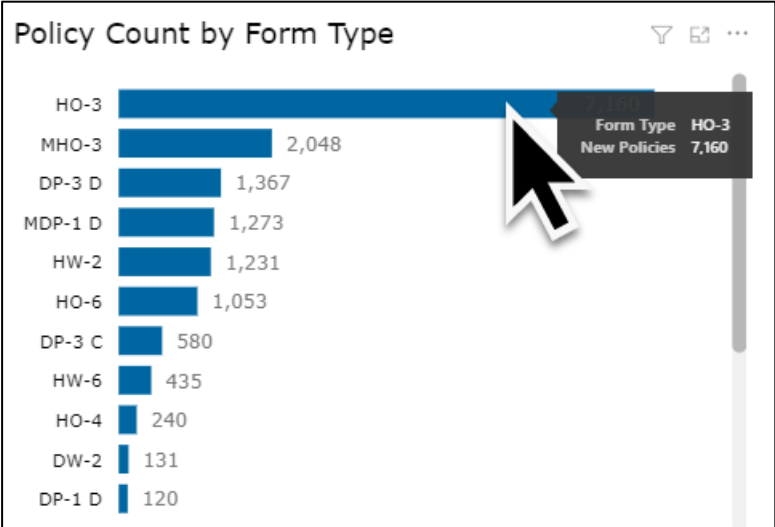
Viewing, Filtering and Exporting Dashboard Data

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:

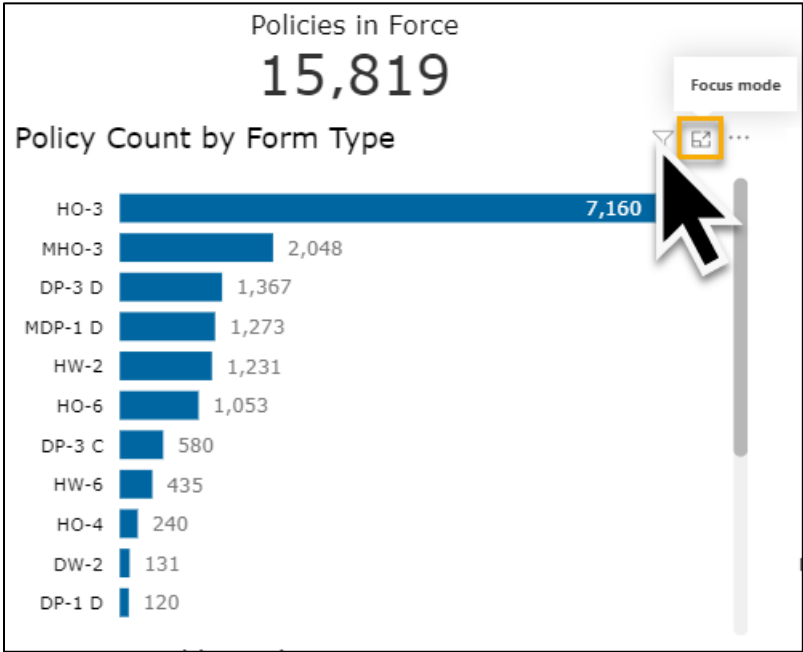
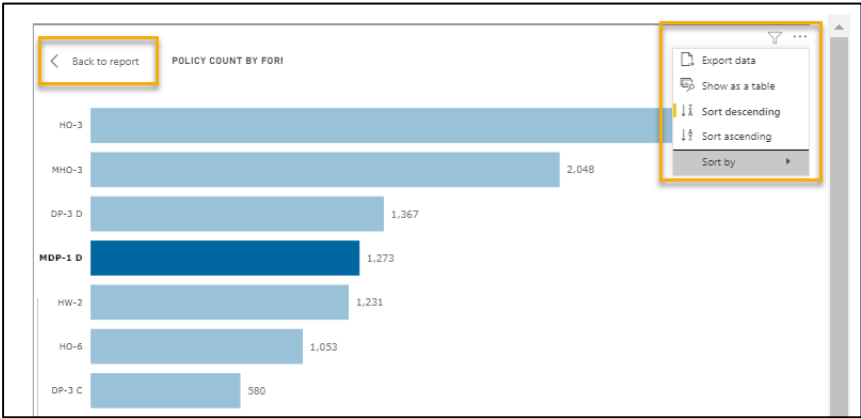
- View, sort and filter reports
- Export reports to Excel

To	Action																								
View Report Details View details about the data behind the chart on both dashboards and reports.	Hover over a tile to view details about the data behind the visual on both dashboards and reports.  <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></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	
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HO-4	131																								
DW-2	120																								
DP-1 D																									

Continued on next page

Dashboard Tab, Continued

Viewing, Filtering and Exporting Dashboard Data, continued

To	Action
View in Focus Mode Use <i>Focus Mode</i> to expand a chart or graph. <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>.	Hover on the tile until the option for <i>Focus mode</i> displays. Select Focus Mode.  Result: The selected chart or graph displays. - To exit Focus mode, select Back to report. - Hover on the chart to access filter and export options. 

Continued on next page

Dashboard Tab, Continued

Viewing, Filtering and Exporting Dashboard Data, continued

To

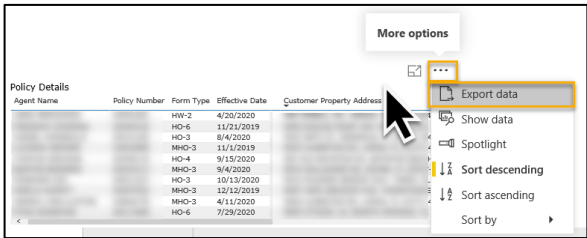
Export Data to Excel

Exporting data to Excel will allow APs and APDs to print and share data.

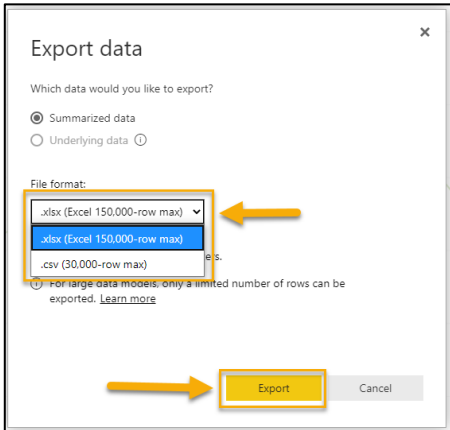
Tip: An agency's book of business can be easily accessed and exported using this feature. Exported files can be printed.

Action

Hover in the chart, graph or list until *More Options* displays, then select **Export Data**:

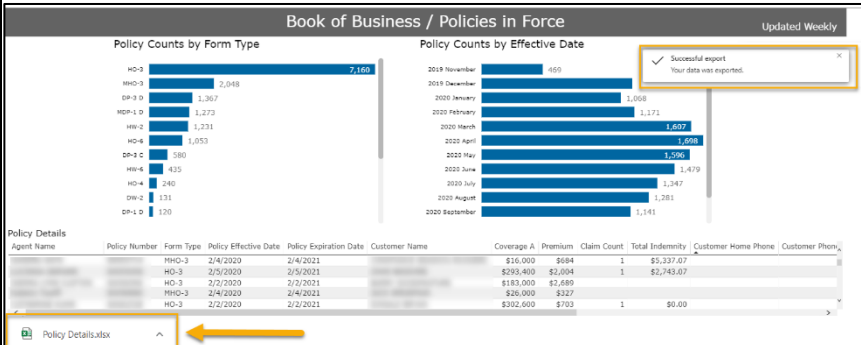


Result: The *Export Data* window appears:



Select the format needed from the **File format** drop-down menu, then **Export**.

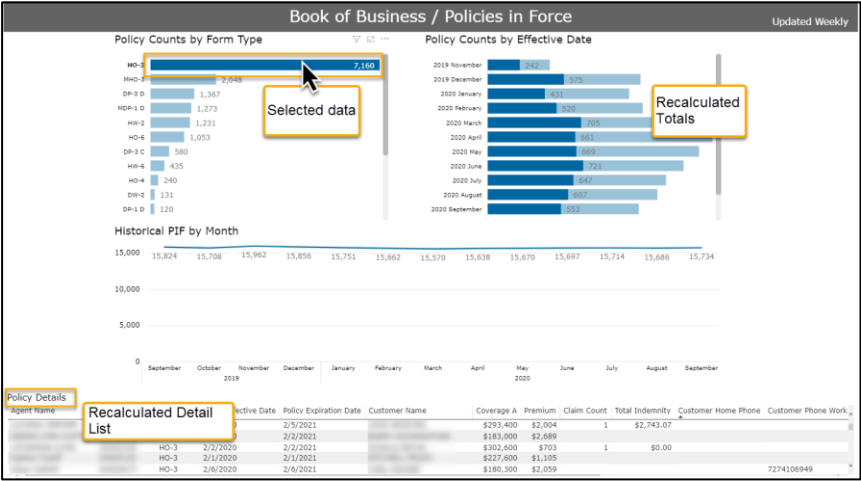
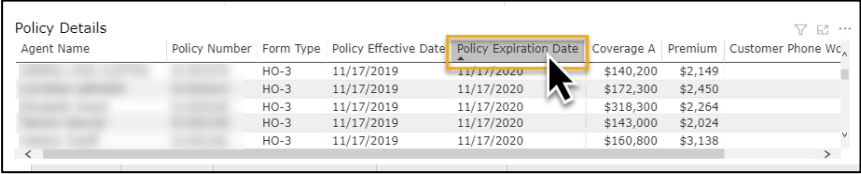
Result: A successful export message will appear. The report will appear in the workspace below:



Continued on next page

Dashboard Tab, Continued

Viewing, Filtering and Exporting Dashboard Data, continued

To	Action
Drill Down Data in a Chart or Graph The total number for each data set will display by default.	To drill down by month or, if applicable, form type, select the data set on the chart. The total for the selected data set will display the recalculated value. Any associated detail lists and/or charts will update based on the selection.  Click within the tile again to clear drill-down settings.
Filter Data in a List Create a custom report using list filters. <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.	<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.  Result: The list will re-sort based on your selection.

Continued on next page

Overview

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

Continued on next page

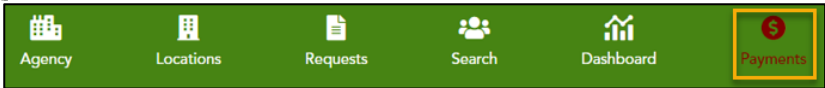
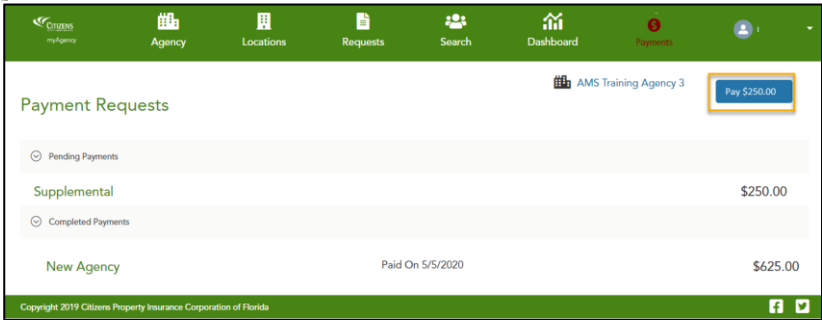
Payments Tab, Continued

Making a Payment

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



To make a payment:

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

Continued on next page

Payments Tab, Continued

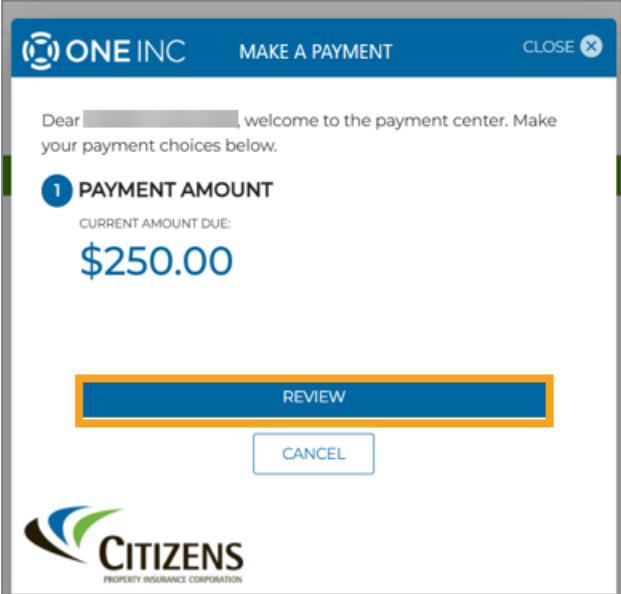
Making a Payment, continued

Step	Action
3	Enter payment information, then select Review: ONE INCADD NEW PAYMENT METHODCLOSE Your data is secured. We are PCI Compliant VISA MasterCard AMERICAN EXPRESS DISCOVER Card Number **** * * * * 👁️VISA Expiration Date 10/29 CVV *** Name on card Billing Address Billing Zip 33139 REVIEW GO BACK

Continued on next page

Payments Tab, Continued

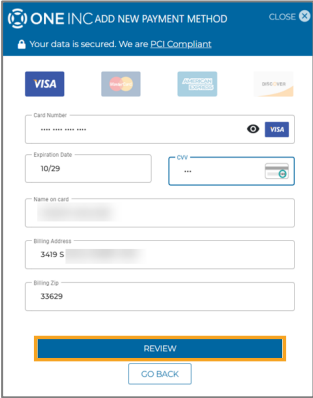
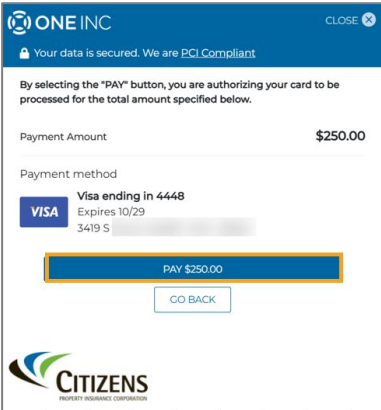
53B Making a Payment, continued

Step	Action
4	Confirm payment amount is correct, then select Review:  Result: The <i>Confirm Payment</i> screen will appear.

Continued on next page

Payments Tab, Continued

53B Making a Payment, continued

Step	Action
5	Enter <i>payment information</i>, then select Review. 
6	Confirm <i>payment amount</i>, then select <i>Review</i>. 

Continued on next page

673BPayments Tab, Continued

730B53B
Maki
ng a
Payment,
Continued

Step	Action
7	The <i>Payment Receipt</i> will generate if processed successfully. Email, Print, or Download the receipt. ONE INC CLOSE You're all set! Total Payment Amount\$250.00 Transaction Number57150596 Credit CardVisa ending in 4448 Payment Date09.15.2026, 01:58 PM EDT You can email receipt to: Email Address kyle.gordey@ckizensfla.com X Send PRINT RECEIPT DOWNLOAD RECEIPT CLOSE Receipt Successfully Sent CLOSE CITIZENS PROPERTY INSURANCE CORPORATION

Continued on next page

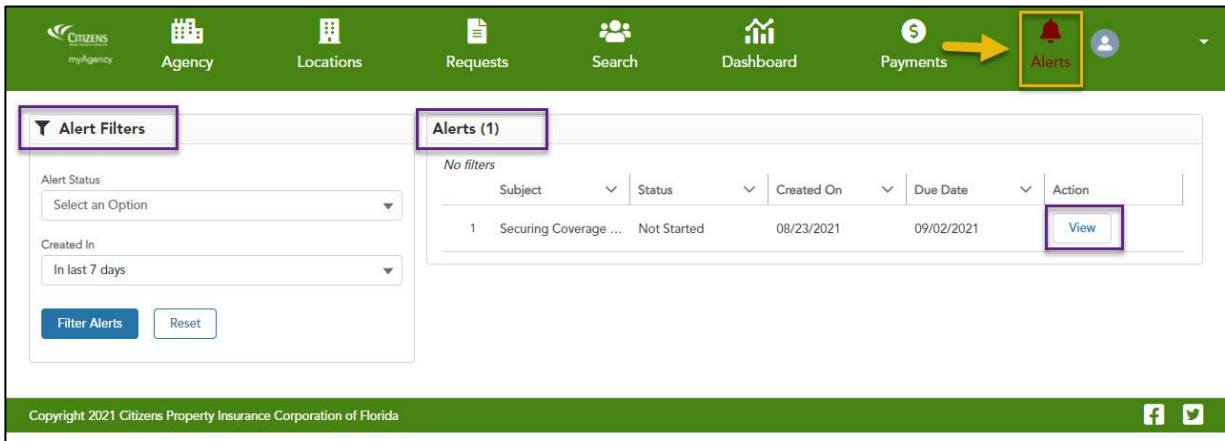
Alerts Tab

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

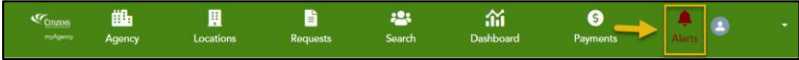
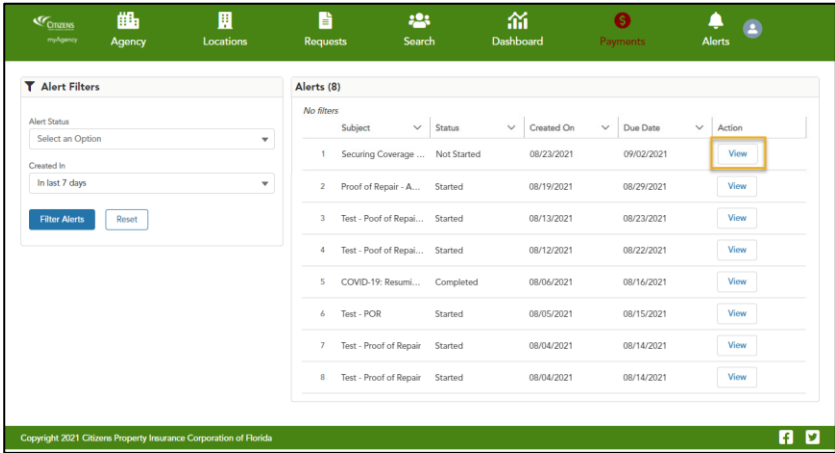
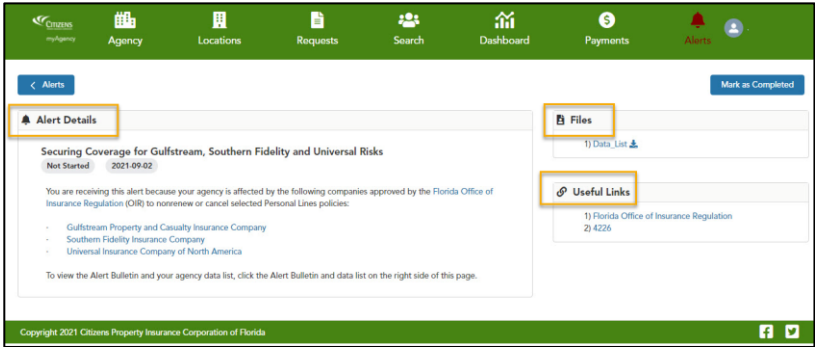


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Alerts Tab, Continued

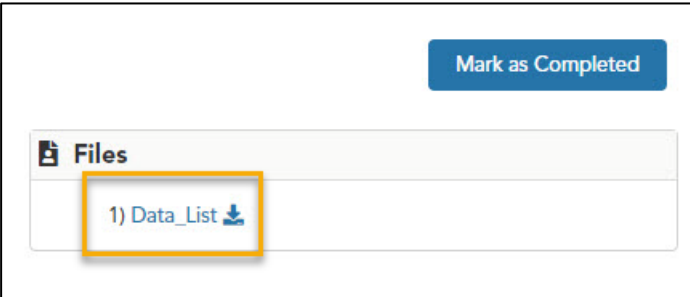
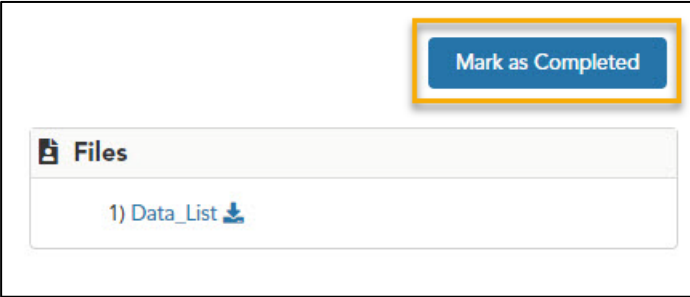
Accessing Alerts

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

Step	Action
1	Select the Alerts tab.  Result: The <i>Alerts</i> tab will display a list of recent communications and their status: • <i>Not Started</i> • <i>Started</i> • <i>Completed</i> <i>Note:</i> Tasks that have not been completed will display first.
2	Select View from the <i>Actions</i> column.  Result: The communication displays.
3	The alert task will include the following: • <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

Accessing Alerts, continued

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

Appendix 1: Assigning Staff Appointment Types

Staff Appointment Type Options

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

Note: Appointment fees and [new](#) agent education requirements do not apply to LCR’s or support staff; however, Citizens reserves the right to assign mandatory education to all credentialed users.

Agent and Staff Credentialing and Appointment Overview					
Suggested Credential	Fully Appointed Citizens Agent	Limited Agent	Licensed Customer Representative (LCR)	Licensed Customer Representative (LCR)	Support Staff
License Type	2-20, 20-44, 9-20, 90-44	2-20, 20-44, 9-20, 90-44	4-40 Only	2-20, 20-44, 9-20, 90-44 or 4-40	No license requirement
Function	Write new business under their own license	Writes new business under a fully appointed agent	Writes new business and service under a fully appointed agent	Services existing business (cannot write new business)	View Only
DFS Appointed*	Yes	Yes	No	No	N/A
Carrier Appointment Requirements	3 appointments for each line of authority (PL, CNR, and/or CR)	3 appointments total	0 appointments ≠	4-40: 0 appointment ≠ 2-20: 1 appointment	N/A
Fees	\$125.00 annually	\$125.00 annually	None	None	None
Education Required	Yes	Yes	No	No	No
Sign Agent Agreement	Yes	Yes	No	No	No
Listed as Agent of Record (AOR)?	Yes	No	No	No	No
Can Write New Business?	Yes, only for themselves	Yes, their location only	Yes, their location only	No	No
Can Service Business?	Yes ‡	Yes, their location only	Yes, their location only	Yes, all locations	No. Can view policy data, notes, and documents, create notes

Appendix 1: Assigning Staff Appointment Types

Agent and Staff Credentialing and Appointment Overview					
PolicyCenter Location Access	Based on Agency Access Requested (single/all)	Single	Single	All locations	N/A
How to indicate in myAgency	Indicate YES to the following questions: - Can the staff member write new business? - Will staff member be an Agent of Record on policies written by your agency? - Does the staff member have a DFS License Number?	Indicate YES to the following question: - Can the staff member write new business? - Does the staff member have a DFS License Number?	Indicate YES to the following question: - Can the staff member service all locations? - Does the staff member have a DFS License Number?	Indicate YES to the following questions: - Can the staff member service all locations? - Does the staff member have a DFS License Number?	Indicate YES to the following question: Is Support Staff?
* Citizens appoints agent with DFS † For any staff added mid-term, the fee will be prorated. ‡ Where will depend on the location access set up for the agency. ≠ The representative should be appointed through DFS for their agency.					

Appendix 2: Agent Appointment Education Requirements

Overview

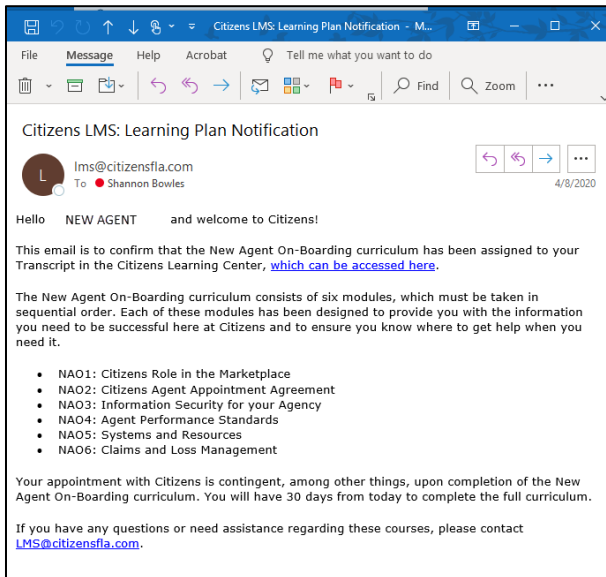
Agents must successfully complete Citizens’ training modules prior to completing their appointment process.

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).

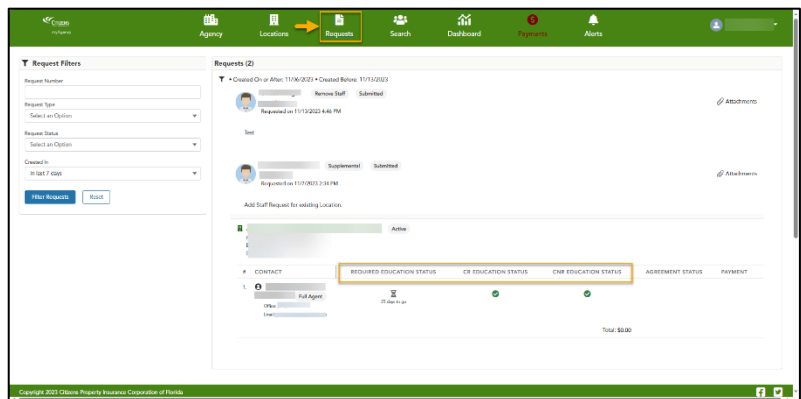
Assigned Education

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.



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Appendix 2: Agent Appointment Education Requirements, Continued

Mandatory Training: Renewal Education Requirements , continued

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

Citizens myAgency

Agency

Locations

Requests

Search

Dashboard

Payments

Alerts

← Payments

Agency Renewal

Remove LCR Staff

Pay \$375.00

Note: The payment button will be unavailable if any of the listed agents have failed to complete mandatory Citizens training. LCR's 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. Please ensure that all mandatory training has been completed or remove any agents/LCRs who you 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
☒		3/3	\$375.00
☒	Pending		\$125.00
☒	Completed		\$125.00
☒	Completed		\$125.00

Select Non-Renewal Reason

Agent no Longer at Agency

Agent no Longer Conducts Citizen...

Training Not Complete

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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:

Citizens myAgency

Agency

Locations

Requests

Search

Dashboard

Payments

Alerts

← Payments

Agency Renewal

Remove LCR Staff

Pay \$250.00

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
☒		2/3	\$250.00
☒	Not Completed		
☒	Completed		\$125.00
☒	Completed		\$125.00

Training Not Complete

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Appendix 2: Agent Appointment Education Requirements, Continued

Mandatory Training: Renewal Education Requirements , continued

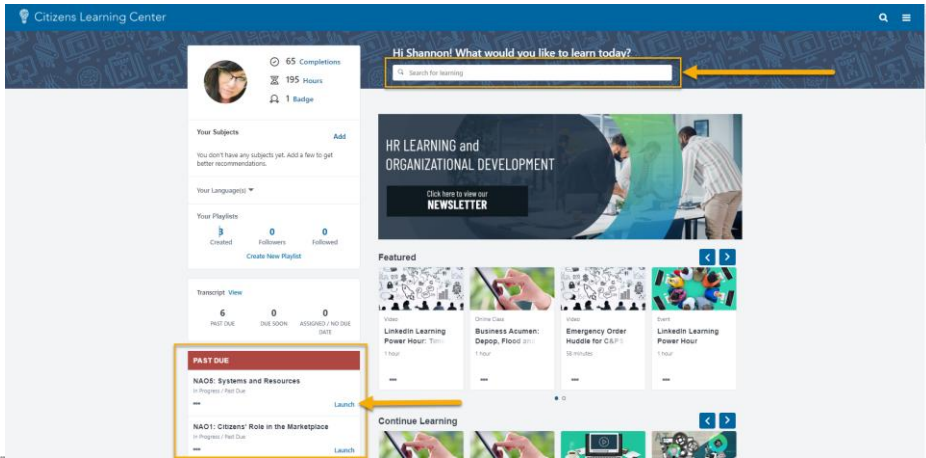
Avoiding Blocked Renewals or Revoked Credentials

To avoid adverse action, credentialed users will need to complete the mandatory training or be removed from the agency’s staff appointment **prior to the agency’s renewal date.**

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



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



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