



FLORIDA OFFICE OF
INSURANCE REGULATION

The Florida Office of Insurance Regulation
has launched the Insurance Regulation
Filing System (IRFS)

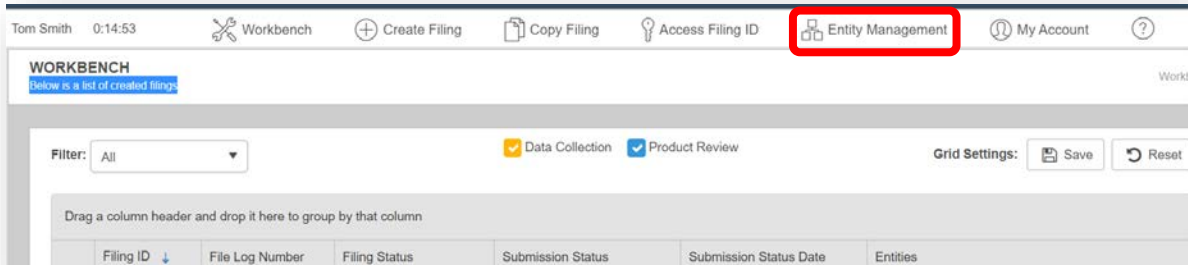
How to Create and Submit Donor Annuity Filings Using the Florida Office of Insurance Regulation Filing System (IRFS)

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Creating a Donor Annuity Filing in IRFS

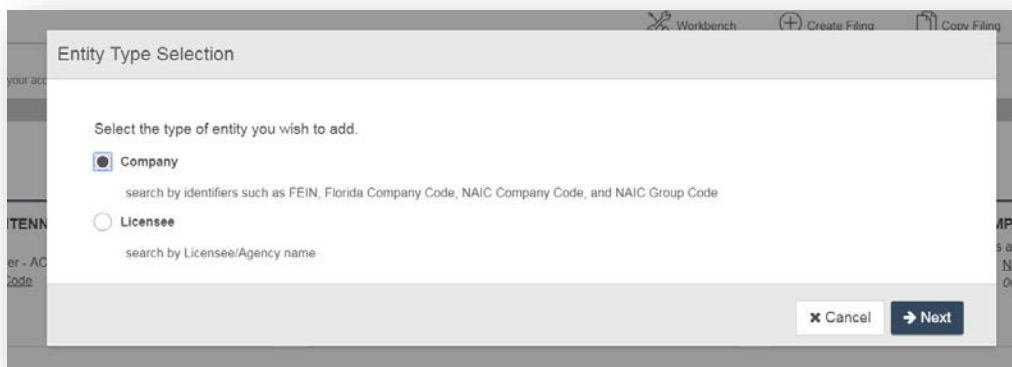
Log in to the IRFS system here: <https://irfs.fldfs.com/> and add your company by clicking on “Entity Management”.



Select “+Add Entity”



Select “Company” and click “Next”.



Type in the name of your company and click on “Search”.

ADD COMPANY
Use the search criteria form below to search and add companies.

Search Criteria

Company Name:

Authority Status: **ACTIVE**

NAIC Company Code: FEIN:

NAIC Group Code: Florida Company Code:

Search Clear

Select your company and click on the “Add Selected” button at the bottom of the page.

Tom Smith 0:14:58 Workbench Create Filing Copy Filing Access Filing ID Entity Management My Account

ADD COMPANY
Use the search criteria form below to search and add companies.

Search Criteria

Company Name	Facility Name	Status	FEIN	NAIC Co
<input checked="" type="checkbox"/>			521263006	

1 - 1 of 1 items

Add Selected Cancel

Return to your Workbench and select “Create Filing”.

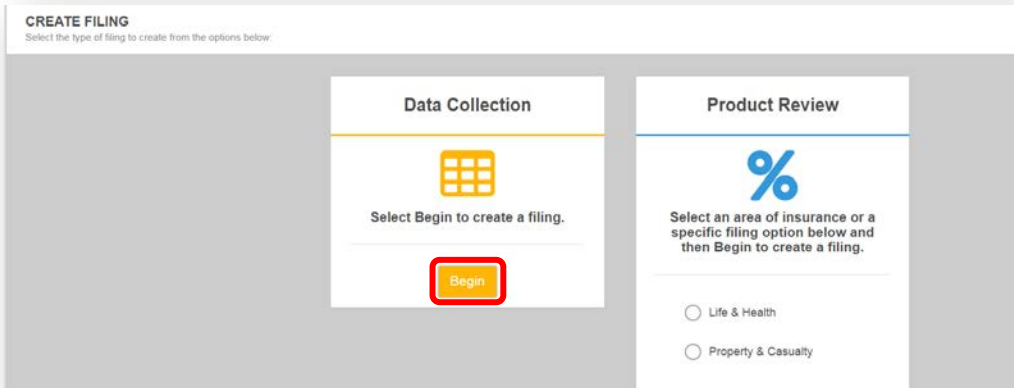
Tom Smith 0:14:54 Workbench **Create Filing** Copy Filing Access Filing ID Entity Management

WORKBENCH
Below is a list of created filings

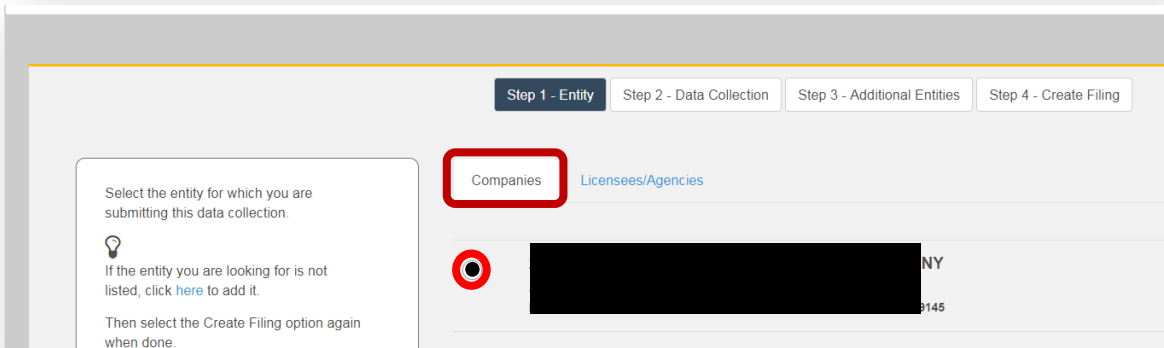
Filter: All Data Collection Product Review Grid Settings:

Drag a column header and drop it here to group by that column

Select the "Begin" button in the "Data Collection" tile.



Select "Companies". Then Select your company and click the "Next" button in the lower right-hand corner of your screen.



Step 2; select your data call and hit "Next". Note: if you see a data call shaded in pink, that means someone associated with your company filed that previous year's data call.

Tom Smith 0:14:55 Workbench Create Filing Copy Filing Access Filing ID Entity Management My Account ?

Purpose	Module	Event	Period
<input checked="" type="radio"/> Data	Donor Annuity Sworn Statement	Donor Annuity Agreements	Donor Annuity Annual 2020 Filing
<input type="radio"/> Data	Donor Annuity Sworn Statement	Donor Annuity Agreements	Donor Annuity Annual 2019 Filing

Previous Next

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In Step 3 click "Next".

Additional entities are not allowed for selected data collection.

Current Selections:

Entity Name(s): [REDACTED]

Module: [REDACTED]

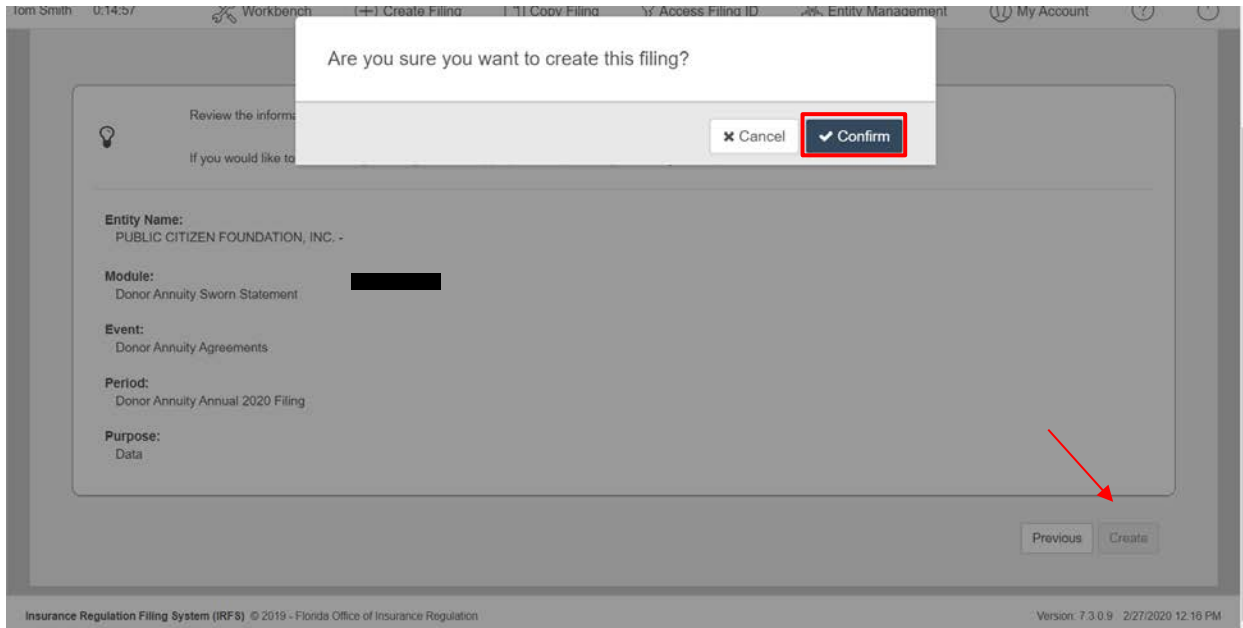
Event: [REDACTED]

Period: [REDACTED]

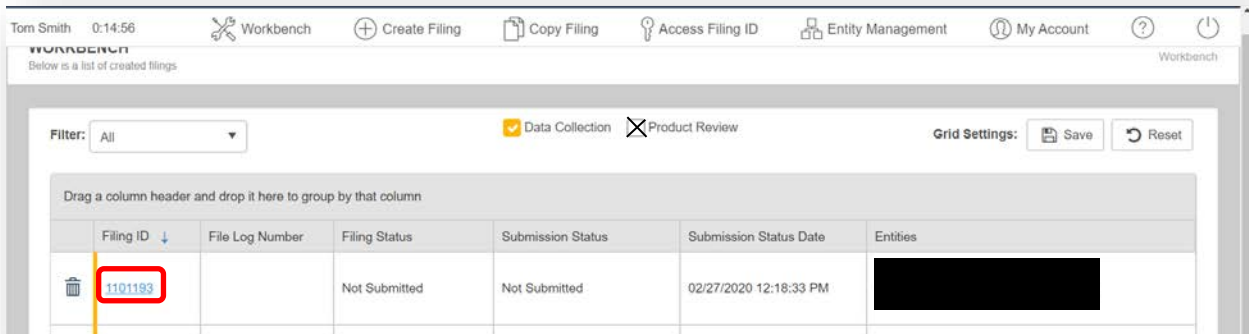
Purpose:
Data

Previous Next

Select the "Create" button in the lower right-hand corner of the screen and then select "Confirm" in the pop-up window.



You will be automatically returned to your workbench; be sure to deselect the "Product Review" box then select your filing by clicking the "Filing ID" number.



Working Your Donor Annuity Data Filing in IRFS

Scroll down to the list of filing components. The first three components are mandatory; the last two are optional and not required.

om Smith 0:14:57 Workbench Create Filing Copy Filing Access Filing ID Entity Management My Account ?

Filing Purpose: Data Donor Annuity Annual 2020 Filing

Review this filing Add to Submitted Filing Submit

Drag a column header and drop it here to group by that column

Submission ID	Submission Type	Submission Status	Created Date
1120511	Original	Not Submitted	02/27/2020 12:18:33 PM

Component Name	Status
+ Contacts <i>Contacts for this filing</i>	Incomplete
+ Donor Annuity Survey	Incomplete
+ Donor Annuity Sworn Statement Upload	Incomplete
+ Other Information/Documents (Optional) <i>Miscellaneous information or documents voluntarily provided by the submitting entity.</i>	-----
+ Response to Request for Clarification (Optional) <i>A formal reply from the submitter to a request from an internal analyst/reviewer for additional information.</i>	-----

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Click on the plus sign to the left of the “Contacts” component; review the contact information and if it is correct, click on the radio button in the “Primary” column. You must then click “Save” at the bottom of the screen. You can add or remove contacts as needed.

P...	Cc	Full Name	Email Address
		Tom Smith	tom.zutell@flair.com

If you would like to include any individuals not listed above as Cc contacts, enter their email addresses below (separated by semicolons).

Click the minus sign to the left of “Contacts” to close the window. Note the status for Contacts is now shown as **Completed**.

Select the plus sign next to the “Donor Annuity Survey” component and fill it out.

Tom Smith 0:14:57 Workbench Create Filing Copy Filing Access Filing ID Entity Management My Account

Drag a column header and drop it here to group by that column

Submission ID	Submission Type	Submission Status	Created Date
1120511	Original	Not Submitted	02/27/2020 12:18:33 PM

Component Name	Status
+ Contacts <i>Contacts for this filing</i>	Completed
- Donor Annuity Survey	Incomplete

Provide answers to the questions below. Those marked with an * are required.

Survey

General Information - Sworn Statement in Lieu of Annual Statement for Issuers of Donor Annuity Agreements

* 1 Street Address

* 2 City

Once completed, click Save and then the minus sign next the “Donor Annuity Survey” to close that window.

Tom Smith 0:14:57 Workbench Create Filing Copy Filing Access Filing ID Entity Management My Account

Filing Purpose: Data Donor Annuity Annual 2020 Filing

Review this filing Add to Submitted Filing Submit

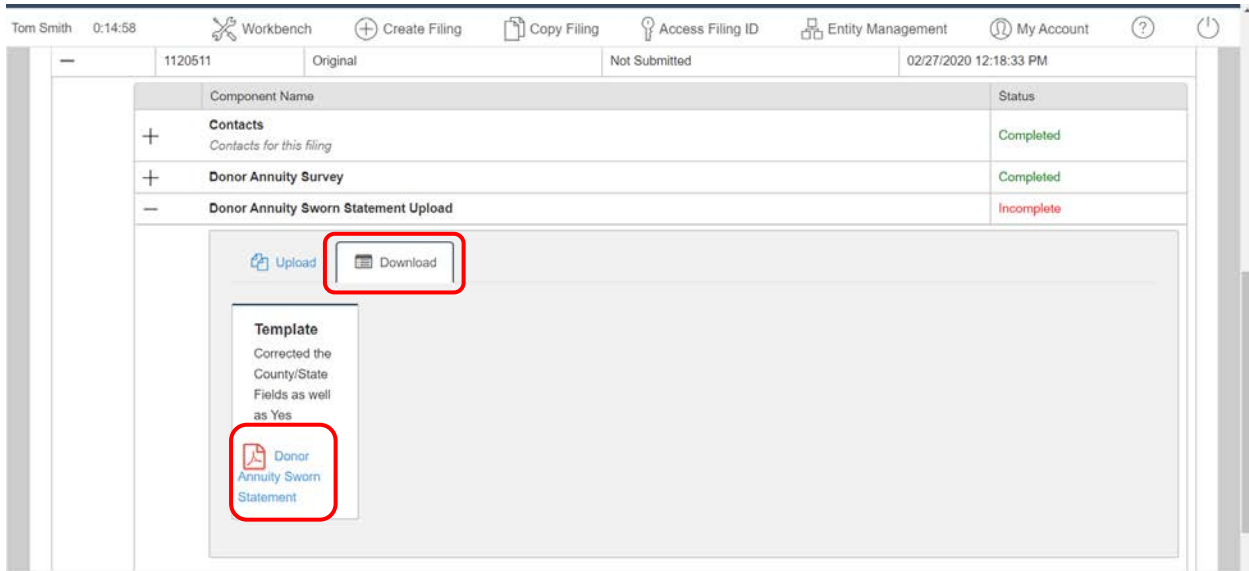
Drag a column header and drop it here to group by that column

Submission ID	Submission Type	Submission Status	Created Date
1120511	Original	Not Submitted	02/27/2020 12:18:33 PM

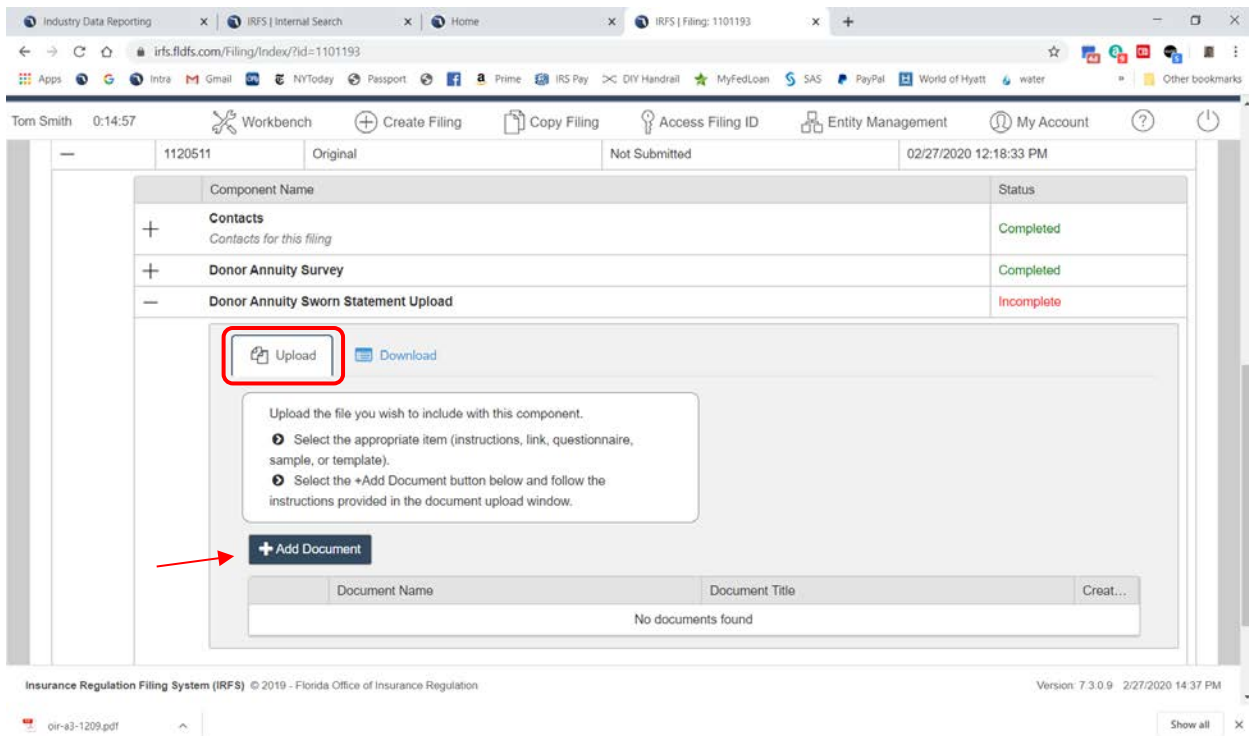
Component Name	Status
+ Contacts <i>Contacts for this filing</i>	Completed
+ Donor Annuity Survey	Completed
+ Donor Annuity Sworn Statement Upload	Incomplete
+ Other Information/Documents (Optional) <i>Miscellaneous information or documents voluntarily provided by the submitting entity.</i>	-----
+ Response to Request for Clarification (Optional) <i>A formal reply from the submitter to a request from an internal analyst/reviewer for additional information.</i>	-----

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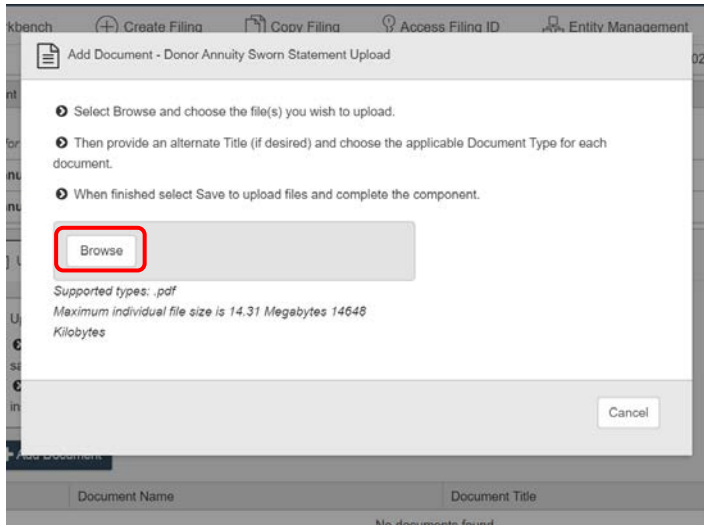
Select the plus sign next to the Donor Annuity Sworn Statement Upload component, select “Download” and click on the .pdf icon. It is advisable to save the template to your desktop for easy access. Follow the instructions and fill out the .pdf template; you can save your work, close the template and come back to it at any time.



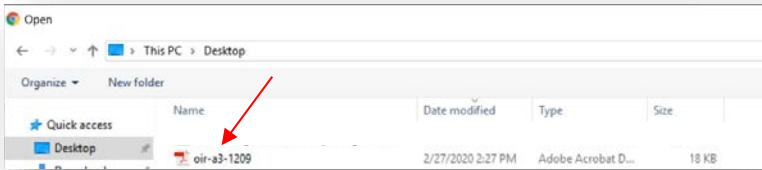
The next component asks for the filer to upload the document. Open the component, click on “Upload”, select the “+ Add Document” button and follow the upload instructions.



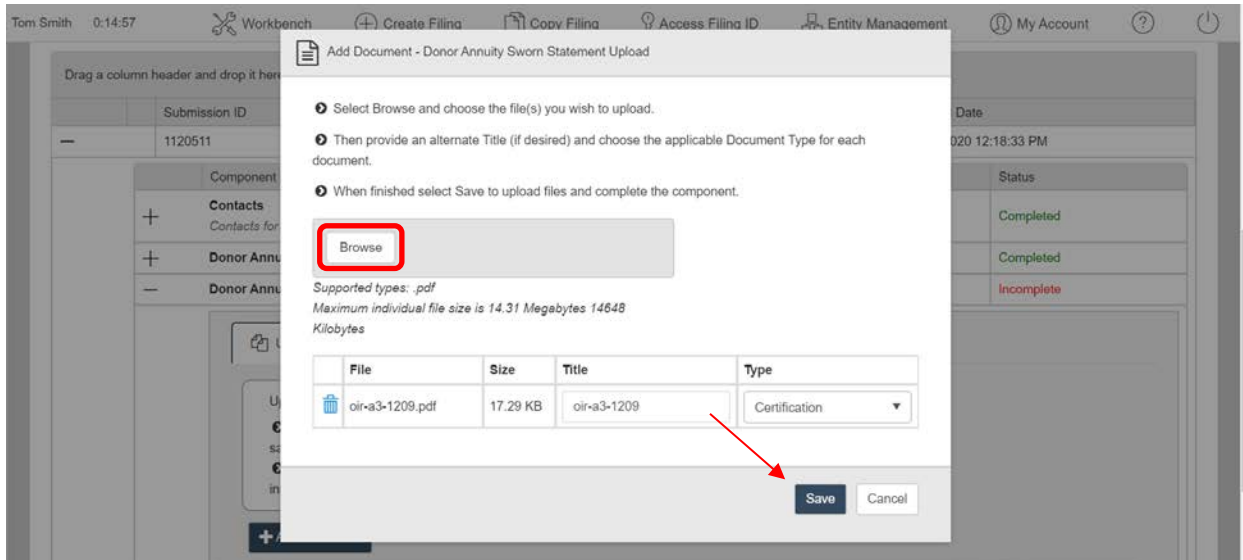
Select "Browse" and find your completed Donor Annuity Sworn Statement.



Double click on your document to upload it.



Press the "Save" button to complete the component.



Now that all the required components' statuses are **Completed**, click the "Submit" button to submit your filing.

The screenshot shows a web interface for filing. At the top, it displays 'Status: Not Submitted' and 'Filing Purpose: Data'. On the right, it says 'Donor Annuity Agreements' and 'Donor Annuity Annual 2020 Filing'. Below this, there are two buttons: 'Review this filing' and 'Add to Submitted Filing'. A red box highlights the 'Submit' button. Below the buttons is a table with columns: Submission ID, Submission Type, Submission Status, and Created Date. The table contains one row with Submission ID 1120511, Submission Type Original, Submission Status Not Submitted, and Created Date 02/27/2020 12:18:33 PM. Below this table is another table with columns: Component Name and Status. The components listed are: Contacts (Status: Completed), Donor Annuity Survey (Status: Completed), Donor Annuity Sworn Statement Upload (Status: Complete), and Other Information/Documents (Optional) (Status: -----). A red bracket groups the 'Completed' and 'Complete' statuses.

Submission ID	Submission Type	Submission Status	Created Date
1120511	Original	Not Submitted	02/27/2020 12:18:33 PM

Component Name	Status
+ Contacts <i>Contacts for this filing</i>	Completed
+ Donor Annuity Survey	Completed
+ Donor Annuity Sworn Statement Upload	Complete
+ Other Information/Documents (Optional) <i>Miscellaneous information or documents voluntarily provided by the submitting entity.</i>	-----

You will receive an auto-generated email from the Office confirming your submission minutes after you submit your filing.

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