



FLORIDA OFFICE OF
INSURANCE REGULATION

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

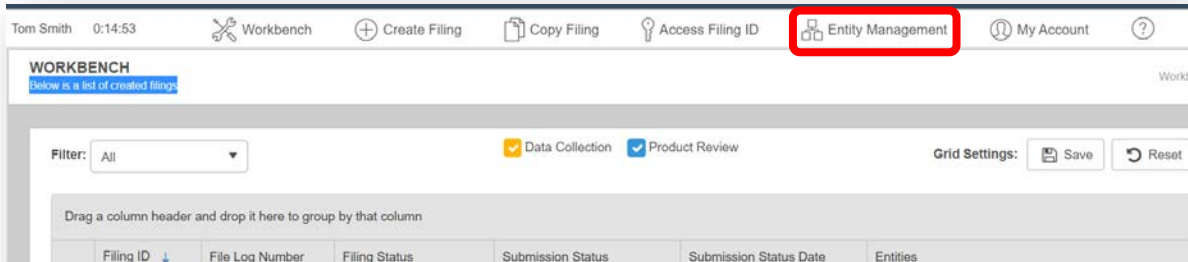
How to Create and Submit Donor Annuity Filings Using the Florida Office of Insurance Regulation Filing System (IRFS)

Contents

Creating a Donor Annuity Filing in IRFS	2
Working Your Donor Annuity Data Filing in IRFS	7

Creating a Donor Annuity Filing in IRFS

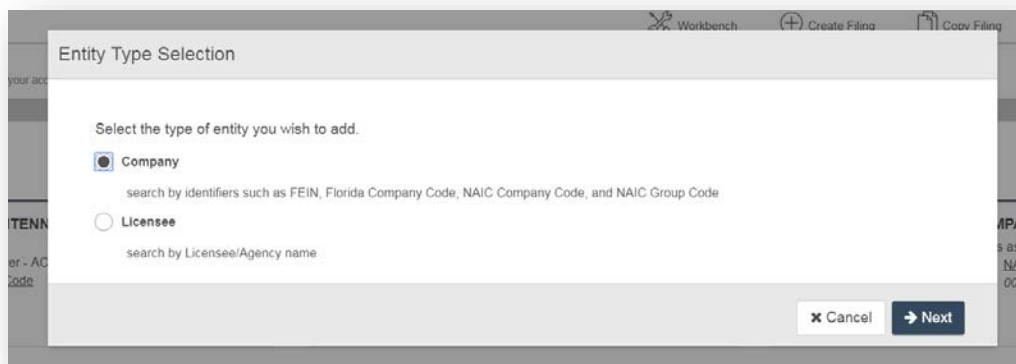
Log in to the IRFS system here: <https://irfs.fldfs.com/> and add your company by clicking on “Entity Management”.



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:

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

Tom Smith 0:14:55 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. [Workbench](#) / [Entity Management](#) / [Add Company](#)

Search Criteria

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

1 - 1 of 1 items

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:

☒ 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.

CREATE FILING
Select the type of filing to create from the options below.

Data Collection

Select **Begin** to create a filing.

Begin

Product Review

Select an area of insurance or a specific filing option below and then **Begin** to create a filing.

☐ Life & Health

☐ Property & Casualty

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

Step 1 - Entity | Step 2 - Data Collection | Step 3 - Additional Entities | Step 4 - Create Filing

Select the entity for which you are submitting this data collection.

If the entity you are looking for is not listed, click [here](#) to add it.

Then select the Create Filing option again when done.

Companies | Licensees/Agencies

[Redacted Company Name] NY

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.

The screenshot shows the Insurance Regulation Filing System (IRFS) interface. At the top, there is a navigation bar with the user's name 'Tom Smith', a timer '0:14:55', and several icons for 'Workbench', 'Create Filing', 'Copy Filing', 'Access Filing ID', 'Entity Management', 'My Account', and a help icon. Below the navigation bar is a large grey area. At the bottom of this area is a table with the following columns: Purpose, Module, Event, and Period. The table contains two rows. The first row is selected with a blue circle icon and has a white background. The second row is shaded pink and has a pink circle icon. Below the table are 'Previous' and 'Next' buttons. A red arrow points to the 'Next' button. At the bottom of the screen, there is a footer with the text 'Insurance Regulation Filing System (IRFS) © 2019 - Florida Office of Insurance Regulation' and 'Version: 7.3.0.9 6/27/2020 12:10 PM'.

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

Insurance Regulation Filing System (IRFS) © 2019 - Florida Office of Insurance Regulation Version: 7.3.0.9 6/27/2020 12:10 PM

In Step 3 click “Next”.

The screenshot shows the Insurance Regulation Filing System (IRFS) interface. On the left side, there is a white box with a lightbulb icon and the text 'Additional entities are not allowed for selected data collection'. Below this is a section titled 'Current Selections:' with the following fields: 'Entity Name(s):', 'Module:', 'Event:', 'Period:', and 'Purpose:'. Each field has a black redaction box. The 'Purpose:' field is set to 'Data'. On the right side of the screen, there are 'Previous' and 'Next' buttons. A red arrow points to the 'Next' button.

Additional entities are not allowed for selected data collection.

Current Selections:

Entity Name(s): [REDACTED]

Module: [REDACTED]

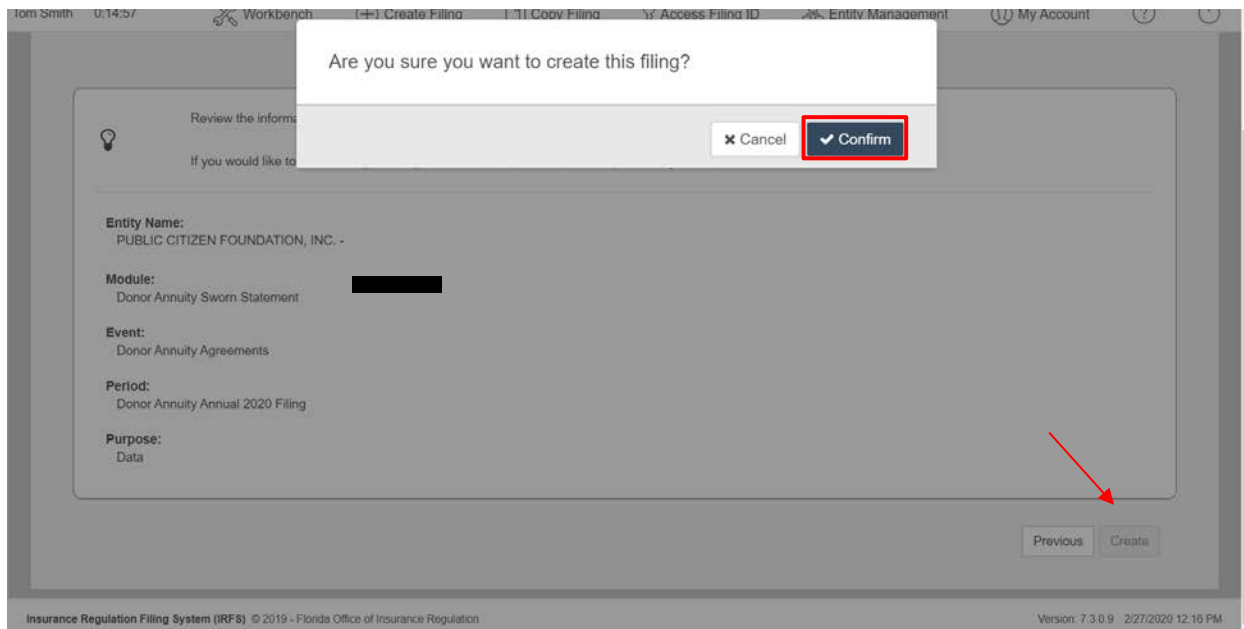
Event: [REDACTED]

Period: [REDACTED]

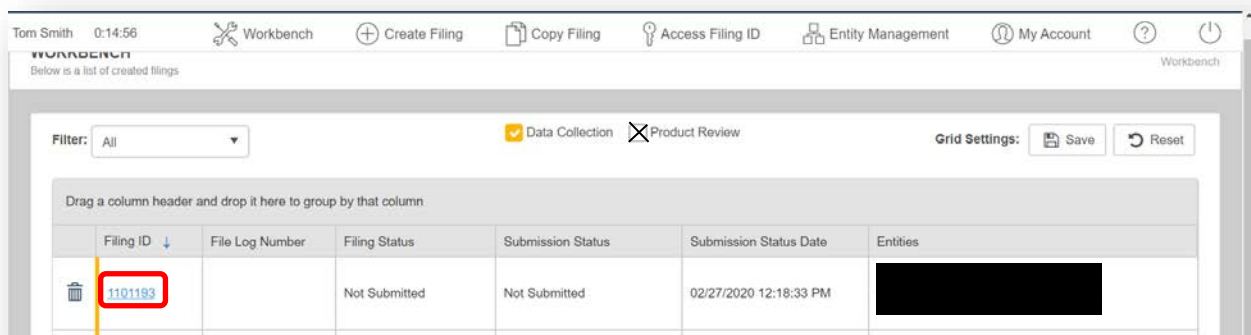
Purpose: Data

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.

Contacts
Contacts for this filing Incomplete

Select the +Add Contact option below to display the list of individuals subscribed to entities associated with this filing.
Add any that you would like to be included on all correspondence pertaining to this filing.
When finished select Save to complete this component, whether or not changes have been made.
Note - If individuals listed are not associated with entities in this filing, contact the Office at (850) 413-3147 to have their access removed.

+ Add Contact

P...	Cc	Full Name	Email Address
<input checked="" type="radio"/>	<input type="checkbox"/>	Tom Smith	tom.zutell@flor.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**.

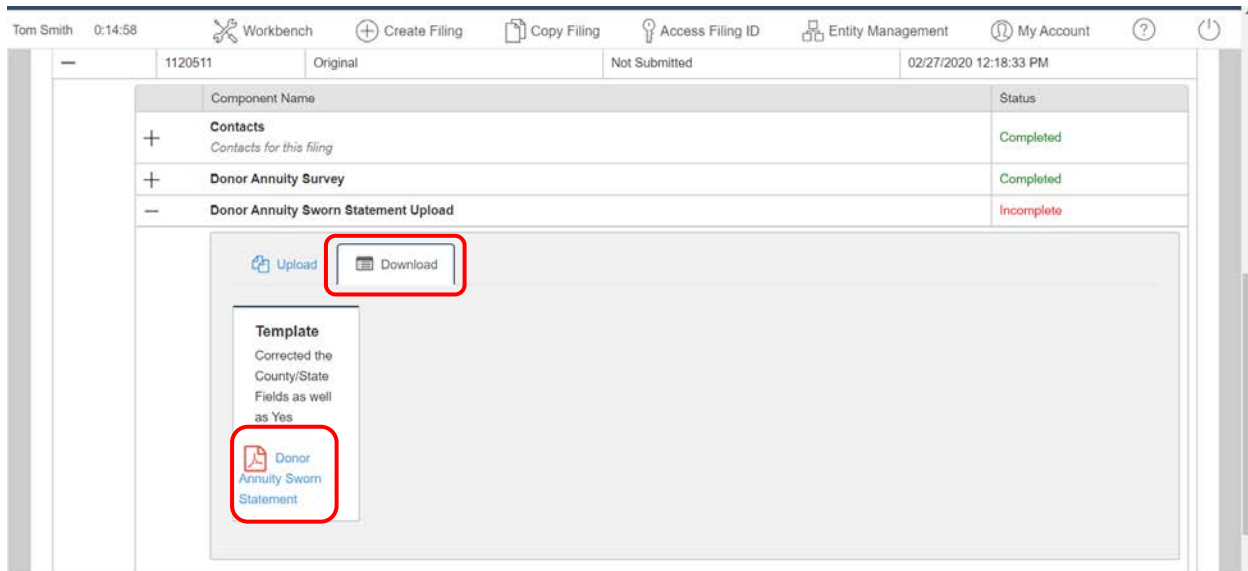
Select the plus sign next to the “Donor Annuity Survey” component and fill it out.

The screenshot shows the IRFS interface with the 'Donor Annuity Survey' component expanded. The top navigation bar includes 'Tom Smith 0:14:57', 'Workbench', 'Create Filing', 'Copy Filing', 'Access Filing ID', 'Entity Management', 'My Account', and a help icon. Below the navigation bar 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 the table is a component list with columns: Component Name and Status. The 'Contacts' component is expanded, showing 'Contacts for this filing' with a status of 'Completed'. The 'Donor Annuity Survey' component is collapsed, showing a status of 'Incomplete'. The survey form is displayed below the component list, with a title 'General Information - Sworn Statement in Lieu of Annual Statement for Issuers of Donor Annuity Agreements'. The form includes a text input field for 'Street Address' and a text input field for 'City'.

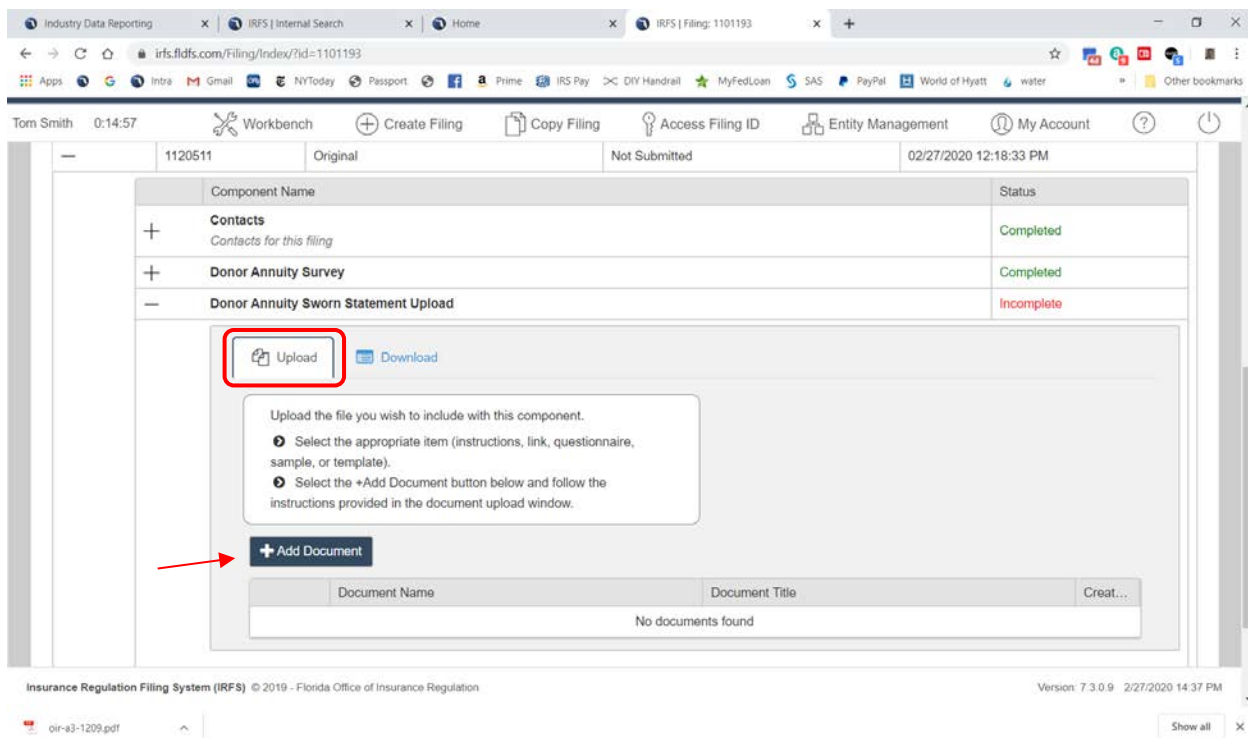
Once completed, click Save and then the minus sign next the “Donor Annuity Survey” to close that window.

The screenshot shows the IRFS interface with the 'Donor Annuity Survey' component completed. The top navigation bar is the same as the previous screenshot. Below the navigation bar 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 the table is a component list with columns: Component Name and Status. The 'Contacts' component is expanded, showing 'Contacts for this filing' with a status of 'Completed'. The 'Donor Annuity Survey' component is expanded, showing 'Donor Annuity Survey' with a status of 'Completed'. The 'Donor Annuity Sworn Statement Upload' component is collapsed, showing a status of 'Incomplete'. The 'Other Information/Documents (Optional)' component is collapsed, showing a status of '-----'. The 'Response to Request for Clarification (Optional)' component is collapsed, showing a status of '-----'. The survey form is displayed below the component list, with a title 'General Information - Sworn Statement in Lieu of Annual Statement for Issuers of Donor Annuity Agreements'. The form includes a text input field for 'Street Address' and a text input field for 'City'.

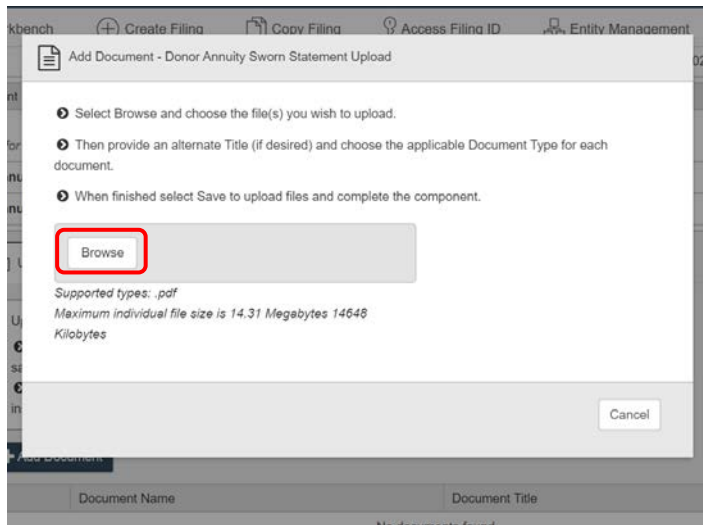
Select the plus sign next to the Donor Annuity Sworn Statement Upload component, select “Download” and click on the .pdf icon. It is advisable to save the template to your desktop for easy access. Follow the instructions and fill out the .pdf template; you can save your work, close the template and come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



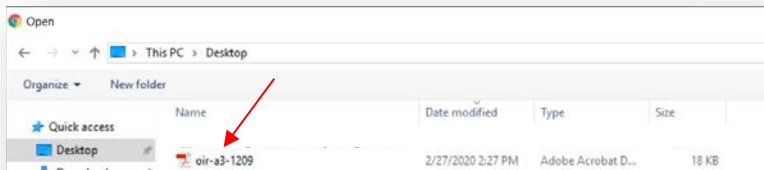
The next component asks for the filer to upload the document. Open the component, click on “Upload”, select the “+ Add Document” button and follow the upload instructions.



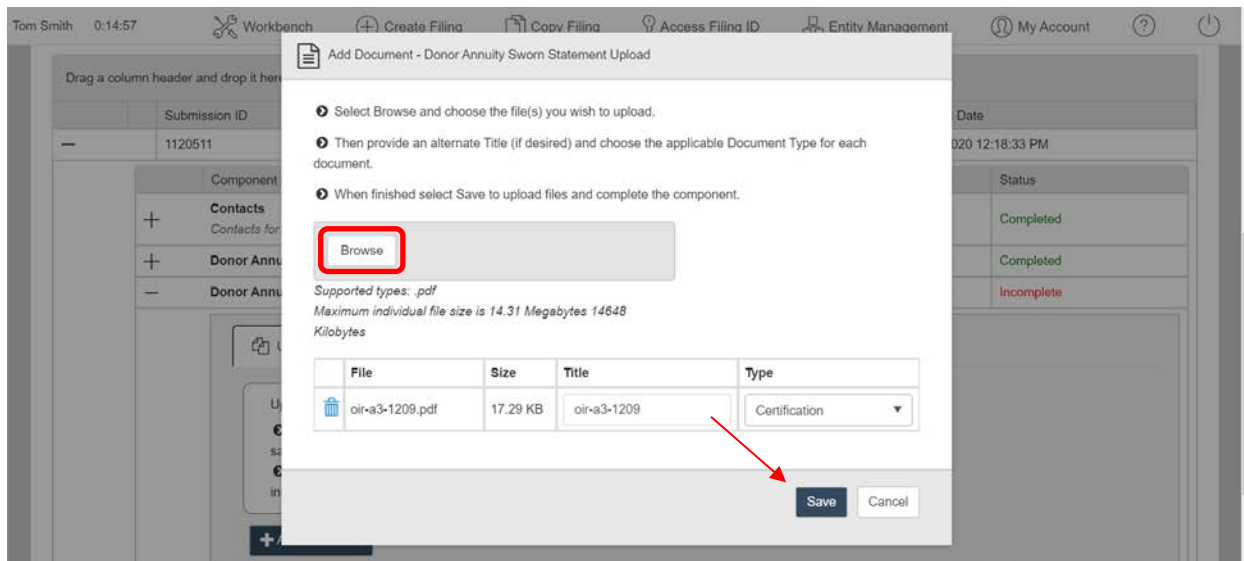
Select “Browse” and find your completed Donor Annuity Sworn Statement.



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.

Status: Not Submitted Donor Annuity Agreements
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	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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