Participation System
User Manual

December 8, 2021

CITIZENS
PROPERTY INSURANCE CORPORATION

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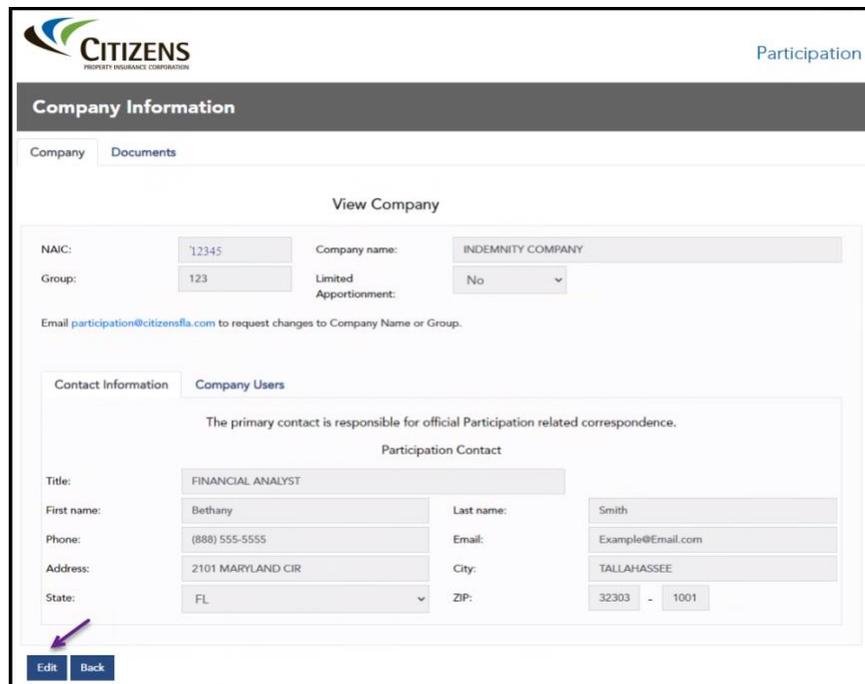| **The Participation System**	This guide details features of the Participation System for companies. Companies can access the system year-round to update company contact information and add users. Premium data entry and excess credit transfer information is limited to a specified annual open period.

Before Open Period (January 1 – Open Date)

1. When a User logs in the following are displayed:
   a. The Open Period dates
   b. The company and/or companies associated with the User
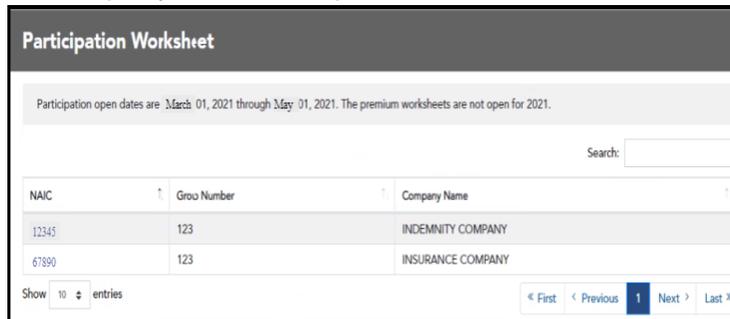
Participation Worksheet

Participation open dates are March 01, 2021 through May 01, 2021. The premium worksheets are not open for 2021.

Search:

NAIC	Groo Number	Company Name
12345	123	INDEMNITY COMPANY
67890	123	INSURANCE COMPANY

Show 10 entries   « First ‹ Previous 1 Next › Last »

2. Select the **NAIC number** to see respective company details.
   a. Select **Edit** to modify **Contact Information**, then select **Save Company**.
   b. Refer to the *Add Users* section for information on the *Company Users* tab.

3. Select the **Participation Link** to return to the main page.
Note: There is no access to the worksheet prior to the open period.

During Open Period

Once the Participation system is open, users are required to enter their assessable premium data. Those companies that have applied for voluntary credits can specify companies that can receive any excess credits. Each company contact must be confirmed before the worksheet is available.

1. When a User logs in the following are displayed:
   a. The Open Period dates
   b. The company and/or companies associated with the User
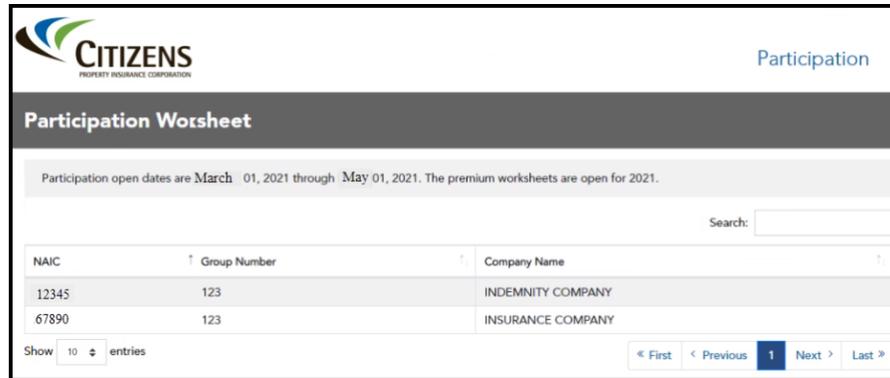
2. Select the **NAIC number** to see respective company details.
3. The first time each company is accessed in the Open Period, the correspondence contact information must be reviewed and confirmed on *the Company Tab/View Company* page. Select **Contact Confirmed** if no changes are needed.
   Note: Contact details are required and must be provided to proceed.
   a. To modify contact information select **Edit**.
   b. Make any necessary changes and select **Save and Confirm**.
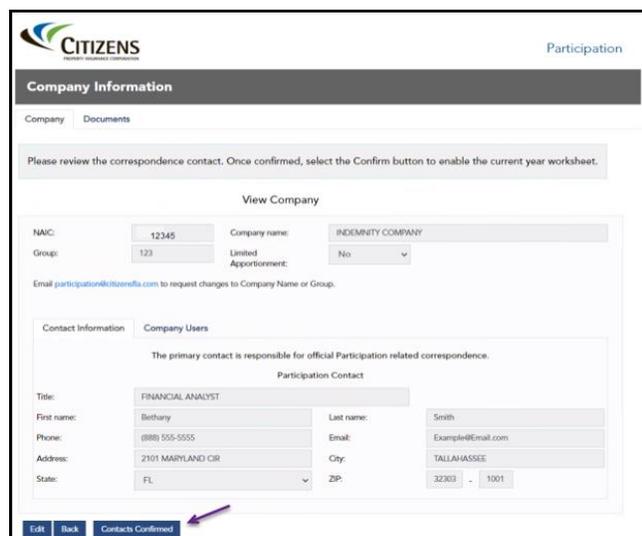
4. The *Premium Worksheet* is available for entry after the contact is confirmed.
5. Enter Premium and Dividends and select **Save Worksheet**.

6. Companies that have applied for Voluntary Credits, see the *Transfer Credits* section below.
7. Select the **Participation** link to return to the main page.

Closed Period   Once the Participation system is closed for premium entry, users can view their premium data and documents. The premium worksheets and/or transfer credit information cannot be edited.

1. When the user logs in, a message is displayed that the system is closed.
2. Select the **NAIC number** to view respective company related information.
3. Company information can be edited.

4. Select the **Documents** tab to view the *Notice of Rights and Statement* (available in PDF format). Documents will be available once the annual statements are printed and mailed.

Transfer
Credits

The *Transfer Credits* tab is available for companies that have applied for Voluntary Credits. The transferring insurer specifies the order the companies are to receive any excess credits.

1. Select **NAIC number** to view company details.
2. Select the **Transfer Credits** tab.
3. Search by **NAIC number** or **Company Name**.
4. Select **Add**. Repeat process until all companies have been specified.
5. To specify the order of a company in the list, select the company and then select **Move Up** or **Move Down**.

6. Select **Save** when done.

Each company has one Primary User. The Primary User can view all users associated to a company and can add users to the company.

1. Select **NAIC number** to view company details
2. Select the **Company** tab.

Add Users

3. Within the Company tab, select the **Company Users** tab
4. All users associated to the Company are displayed.
5. To add a user to the company, select **Add User**.

6. Complete all user fields.

7. Primary users of multiple companies can also associate the user to those companies by selecting **Add**.
8. Select one or more companies to add the user to those companies.
9. Select **Add**.
10. Select **Submit**.

Add User Companies

Select companies user can access.

	NAIC	Group	Company Name
☐	10835	123	INDEMNITY COMPANY
	30511	123	INSURANCE COMPANY

Add Cancel

11. The user will receive an email with access to the added NAIC number(s). New users must register to access the system. See *Registration for System Access*.