

# Participation System User Manual

December 8, 2021



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## The Participation System

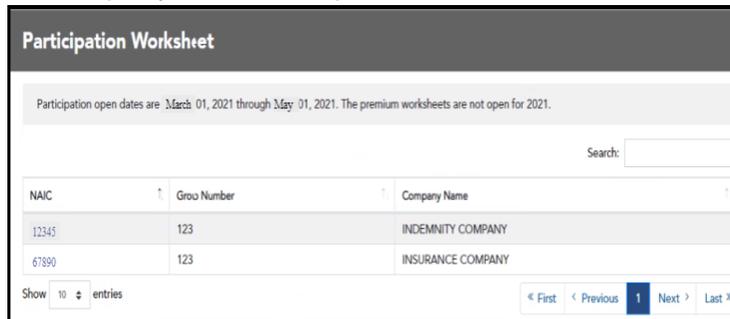
Before Open Period  
(January 1 –  
Open Date)

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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.

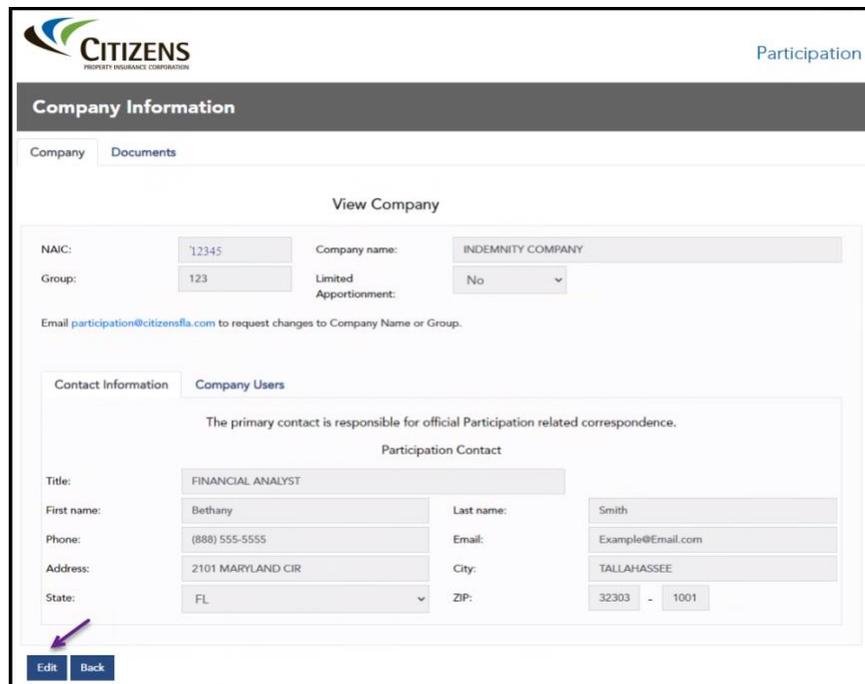
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1. When a User logs in the following are displayed:
  - a. The Open Period dates
  - b. The company and/or companies associated with the User



The screenshot shows a web interface titled "Participation Worksheet". At the top, it states: "Participation open dates are March 01, 2021 through May 01, 2021. The premium worksheets are not open for 2021." Below this is a search bar. A table lists companies with columns for NAIC, Groo Number, and Company Name. The table contains two entries: one with NAIC 12345 and Groo Number 123 for "INDEMNITY COMPANY", and another with NAIC 67890 and Groo Number 123 for "INSURANCE COMPANY". At the bottom, there are pagination controls showing "1" of 1 entries and buttons for "First", "Previous", "Next", and "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.



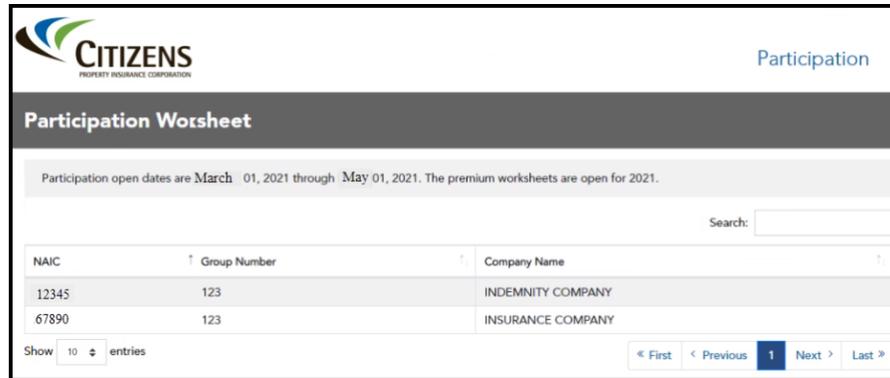
The screenshot shows the "Company Information" page for "INDEMNITY COMPANY". The page has tabs for "Company" and "Documents". Under "View Company", fields for NAIC (12345), Group (123), Company name (INDEMNITY COMPANY), and Limited Apportionment (No) are visible. Below this is a "Contact Information" section with a "Company Users" tab. A note states: "The primary contact is responsible for official Participation related correspondence." The "Participation Contact" form includes fields for Title (FINANCIAL ANALYST), First name (Bethany), Last name (Smith), Phone ((888) 555-5555), Email (Example@Email.com), Address (2101 MARYLAND CIR), City (TALLAHASSEE), State (FL), and ZIP (32303 - 1001). A purple arrow points to the "Edit" button at the bottom left.

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

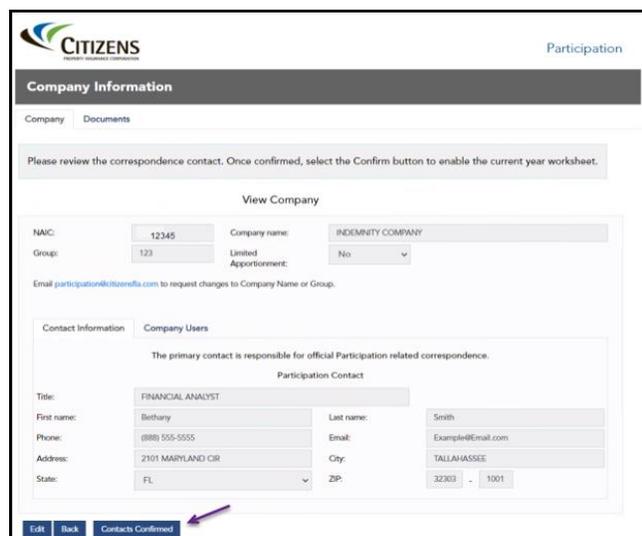
1. When a User logs in the following are displayed:
  - a. The Open Period dates
  - b. The company and/or companies associated with the User



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**.

Line #	Lines of Business	Direct Premiums Written	Dividends Paid or Credited	Totals
1.0	Fire	\$0	\$0	\$0
2.1	Allied Lines	\$0	\$0	\$0
2.2	Multi-Peet Crop (EXCLUDE Federal Crop Premiums)	\$0	\$0	\$0
2.4	Private crop	\$0	\$0	\$0
2.5	Private food	\$0	\$0	\$0
3.0	Farmowners Multi-Peet	\$0	\$0	\$0
4.0	Homeowners Multi-Peet	\$0	\$0	\$0
5.1	Commercial Multi-Peet (own liability portion)	\$0	\$0	\$0
5.2	Commercial Multi-Peet (liability portion)	\$0	\$0	\$0
6.0	Mortgage Guaranty	\$0	\$0	\$0
8.0	Ocean Marine	\$0	\$0	\$0
9.0	Inland Marine	\$0	\$0	\$0
10.0	Financial Guaranty	\$0	\$0	\$0
12.0	Earthquake	\$0	\$0	\$0
17.1	Other Liability - Occurrence	\$0	\$0	\$0
17.2	Other Liability - Claims-made	\$0	\$0	\$0
18.0	Products Liability	\$0	\$0	\$0
19.1	Private Passenger Auto No-Fault (PFI)	\$0	\$0	\$0
19.2	Other Private Passenger Auto Liability	\$0	\$0	\$0
19.3	Commercial Auto No-Fault (PFI)	\$0	\$0	\$0
19.4	Other Commercial Auto Liability	\$0	\$0	\$0
21.1	Private Passenger Auto Physical Damage	\$0	\$0	\$0
21.2	Commercial Auto Physical Damage	\$0	\$0	\$0
22.0	Aircraft (all perils)	\$0	\$0	\$0
23.0	Fidelity	\$0	\$0	\$0
26.0	Surety	\$0	\$0	\$0
26.0	Burglary and Theft	\$0	\$0	\$0
27.0	Boiler and Machinery	\$0	\$0	\$0
28.0	Credits	\$0	\$0	\$0
30.0	Warranty	\$0	\$0	\$0
34.0	Aggregate Write-Ins for Other Lines of Business	\$0	\$0	\$0
T1	Total Gross Direct Premiums Written	\$0	\$0	\$0
Other Assessment Credits (not including Voluntary Credits)				
A1	Statutory Credit Premium - New Writings			\$0
A2	Statutory Credit Premium - Increased Coverage			\$0
A3	Statutory Credit Premium - Take Out			\$0
T2	Total Other Assessment Credits	A1 through A3		\$0
T3	Net Premiums before Voluntary Credits (if applicable)	T1 less T2		\$0

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.

**CITIZENS** Participation

### Company Information

Premium Worksheet Transfer Credits **Company** Documents

View Company

NAIC: 10064 Company name: Citizens Property Insurance Corp.  
Group: - Limited Apportionment: No

Email [participation@citizensfla.com](mailto:participation@citizensfla.com) to request changes to Company Name or Group.

Contact Information Company Users

The primary contact is responsible for official Participation related correspondence.

Participation Contact

Title: FINANCIAL ANALYST

First name: Beth Last name: Gallups  
Phone: 850-555-1234 Email: participation@citizensfla.com  
Address: 2101 Maryland Circle City: Tallahassee  
State: FL ZIP: 32303 - 1001

Edit Back

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.

**CITIZENS** Participation

### Documents

Premium Worksheet Transfer Credits Company **Documents**

NAIC: 10064 Company name: Citizens Property Insurance Corp.

Search:

Document Date	Document File Name
09/14/2021	Statement and Notice of Rights 09-14-2021 02-24-54-000631.pdf

Show 10 entries

« First < Previous 1 Next > Last »

## 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**.

The screenshot shows the 'Voluntary Credits Transfer' interface. At the top, there are tabs for 'Premium Worksheet', 'Transfer Credits', 'Company', and 'Documents'. Below the tabs, there is a red warning message: 'Please select at least one company for Voluntary Credit.' The form contains fields for 'NAIC' (10064), 'Company name' (CITIZENS PROPERTY INSURANCE CORP), and 'Participation Year' (2021). A search section is titled 'Search to add companies to receive excess credits.' It has a search box with '45678' entered and an 'Add' button. Below the search box, a dropdown menu shows '45678 [APPROVAL COMPANY]'. A table below the search section is titled 'Excess credits will be transferred to the companies in the order below:'. The table has columns for 'Order', 'NAIC', and 'Company Name'. The first row is '1', '12345', 'NEW COMPANY TEST'. The second row is '2', '65656', 'Jules Test'. To the right of the table are buttons for 'Move Up', 'Move Down', and 'Remove'. At the bottom left are 'Save' and 'Cancel' buttons. Blue arrows point to the 'Add' button and the 'Move Down' button.

Order	NAIC	Company Name
1	12345	NEW COMPANY TEST
2	65656	Jules Test

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.

## Add Users

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

**CITIZENS** PROPERTY INSURANCE CORPORATION Participation

### Company Information

Premium Worksheet **Company** Documents

View Company

NAIC:  Company name:   
 Group:  Limited Appportionment:

Email [participation@citizensfla.com](mailto:participation@citizensfla.com) to request changes to Company Name or Group.

Contact Information **Company Users**

Login Name	First Name	Last Name	Email
gbutrinaitemarsha	GINA	BUTMINAITE-MANSHA	GBUTS@ALLSTATE.COM

6. Complete all user fields.

**CITIZENS** PROPERTY INSURANCE CORPORATION Participation

### Company Information

Premium Worksheet **Company** Documents

Request User Access

First name:   
 Last name:   
 Email:   
 Verify email:   
 Phone number:

Companies

NAIC	Group	Company Name	Company Status
67880	123	INSURANCE COMPANY	Active

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Add Users  
(Continued)

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**.

	NAIC	Group	Company Name
<input type="checkbox"/>	10835	123	INDEMNITY COMPANY
	30511	123	INSURANCE COMPANY

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*.