

Florida Condominiums, Timeshares and Mobile Homes
Financial Institution Reporting

You can complete your Financial Institution Reporting at:
<http://www.myfloridalicense.com/payment>

The screenshot shows the DBPR Online Services Main Menu. At the top left is the Florida dbpr logo (Department of Business & Professional Regulation). To the right are images of the Florida State Capitol and palm trees, with the text "DBPR ONLINE SERVICES" below them. A "Contact Us" link is in the top right. The main content area contains a "DBPR Online Services Main Menu" section with a red warning about credit card and electronic check payment processing. Below this is a welcome message and instructions for returning users and new users. A "Cookies must be enabled" notice is also present. The page is divided into two columns: "Public Services" with links for "Apply for a New License", "Public License Search", and "File a Complaint"; and "Log in to Online Profile" with input fields for "E-Mail/User ID" and "Password", a "Log On" button, and links for "Forgot your password?" and "Forgot User ID? Click here.". A "Create a New Online Profile" section is at the bottom left with links for "Create My Account" and "Need Help Creating An Account?".

To submit Financial Institution information online you must have an account with the Department of Business and Professional Regulation Online Services.

If you do not have an account you can create one by clicking on the Create Account button.

This will take you to the User Registration page of the Online Application Services page.



The screenshot shows the User Registration page. At the top left is the Florida dbpr logo. To the right are images of the Florida State Capitol and palm trees, with the text "DBPR ONLINE SERVICES" below them. A "Logon | Contact Us" link is in the top right. The main content area is titled "User Registration" and contains instructions: "After entering all of the information requested below, you will receive an e-mail from myfloridalicense@myfloridalicense.com with a temporary password. You will need this temporary password to complete your registration. If you do not receive an e-mail in a short period of time please check your Spam folder." Below this are instructions to "Enter your details and press 'Next'", "Press 'Previous' to return to the previous screen.", and "Press 'Cancel' to cancel this registration and return to the main menu." The registration form is divided into several sections: "Account Owner Contact Information" with input fields for "First Name", "Middle Name", and "Last Name"; "Account Login" with input fields for "Email" (with a note "(e.g. name@domain.com)"), "Confirm Email", and "User ID", and a checkbox for "Use email address as user id" and an input field for "Or enter your own user id"; "Password Recovery (In case you forget your password, you will be required to answer this question to obtain a new temporary password.)" with a "Secret Question" dropdown and input fields for "Or write your own question:" and "Secret Answer:"; and "Security Measures (This helps to prevent automated registrations.)" with a checkbox for "I'm not a robot" and a CAPTCHA image. At the bottom right are "Next" and "Cancel" buttons.

Once you have created your account you can login and link your license. This is done by selecting “Link an Existing License to My Account” under functions on the Main Menu page.

Main Menu
Press the hyperlink for the function you wish to perform or the license you wish to review/maintain.

Functions	Licenses Linked to My Online Services Account <small>Select a license below to renew/maintain:</small>
Apply for a New License	
View User Profile	
File a Complaint	
Make an Online Payment	
Link an Existing License to My Account	
Application Status Inquiry	

Welcome to Online QuickStart select Next.



Main Menu | Update Profile | Logoff | Contact Us
Logged in as Jones, Michael

Step 1: Have You Done Business with Us? Step 2: Provide Identifying Information Step 3: Confirm Information


Welcome to OnlineQuickStart

By answering a few simple questions we'll help you to get started



Step 1

Are you currently licensed and have your license number? OR Have you taken a licensing exam and have your Exam Candidate #?

Yes How do I know? No

 **Next** **Cancel**

Use the Profession/Business dropdown to select “Condominium Financial Institution Reporting”. Then for License Type select Managing Entity and click next.



Main Menu | Update Profile | Logoff | Contact Us
Logged in as Jones, Michael

Step 1: Have You Done Business with Us? Step 2: Provide Identifying Information Step 3: Confirm Information

Welcome to OnlineQuickStart


What type of license do you hold OR taken the licensing exam for?

Step 1

Select your profession or business and license type from the drop down menus below and press "Next" to continue.

* Profession/Business: **Condominium Financial Institution Reporting** How do I know?

* License Type: **Managing Entity** How do I know?

 **Next** **Cancel**

Enter your Managing Entity MA license number and the activation code on the Help us find your records page. We do not use the federal tax ID so you will need to get the 4 digit code on the annual billing statement. Check the I'm not a robot box and select Next.

The screenshot shows the 'Step 2: Provide Identifying Information' page. At the top, there is a navigation bar with 'Main Menu | Update Profile | Logoff | Contact Us' and 'Logged in as Jones, Michael'. Below this is a progress indicator with three steps: 'Step 1: Have You Done Business with Us?', 'Step 2: Provide Identifying Information' (highlighted in yellow), and 'Step 3: Confirm Information'. The main heading is 'Help us to find your records'. Under 'Step 2', it says 'Please provide your credentials' and '* Required Information'. There are two input fields: 'License Number:' and 'Last 4 digits of SSN/Tax#:', both with asterisks. Below these is a 'Security Measures' section with the text '(This helps to prevent automated registrations.)'. It includes a checkbox for 'I'm not a robot' with a reCAPTCHA icon and 'Privacy - Terms' link. There are 'Next' and 'Cancel' buttons at the bottom right.

You will need to verify your information and select the I confirm statement and select Next.

The screenshot shows the 'Step 3: Confirm Information' page. The progress indicator at the top shows 'Step 3: Confirm Information' highlighted in yellow. The main heading is 'Good News! We have located your information'. Under 'Step 3', it says 'Please confirm your credentials'. There is a yellow box with the text 'Select One:' and two radio button options: 'I confirm this is my information (The information you are about to link will be associated with the email address of your DBPR online account.)' and 'No this is not my information'. There are 'Next' and 'Cancel' buttons at the bottom right.

This will bring you back to the Main Menu page. You should see you license listed under "Licenses Linked to My Online Services Account". Click on the license to go to the License Menu.

The screenshot shows the 'Main Menu' page. It has a heading 'Main Menu' and a sub-heading 'Press the hyperlink for the function you wish to perform or the license you wish to review/maintain.'. There are two columns of links. The left column is titled 'Functions' and includes: 'Apply for a New License', 'View User Profile', 'File a Complaint', 'Make an Online Payment', 'Link an Existing License to My Account', and 'Application Status Inquiry'. The right column is titled 'Licenses Linked to My Online Services Account' and includes: 'Select a license below to renew/maintain:' and 'Managing Entity #MA71729' (with a mouse cursor pointing to it).

Select "Financial Institution Reporting" listed under Functions on the License Menu. This will open the Financial Institution Reporting transaction.

License Menu

Select the function you wish to perform.
Press "Back" to return to the main menu.

License Issued To: **TEST MANAGING ENTITY**
License Status: **Approved**
Originally Licensed On:
Expires On:

Functions

[Financial Institution Reporting](#)
[Remove This License From My Account](#)

Back

You will go to the Name and Organizational Details page and select Next.

Financial Institution Reporting - Name and Organizational Details

Please enter or confirm your organizational details and press "Next" to continue.
Press "Cancel" to cancel this application and return to the main menu.

Organization Name: **Test Managing Entity**
Doing Business As Name:
Tax Number (numeric characters only): ******1836**

Next **Cancel**

Next is the Address Detail Summary page. If everything looks good select the Next button. You may update your address by selecting the Main Address link.

Financial Institution Reporting - Address Detail Summary

Press "Add" to add an additional address.
Press "Previous" to return to the previous section.
Press "Next" when finished adding/changing addresses.
Press "Cancel" to cancel this application and return to the main menu.

General Addresses	
Main Address	Address: 2601 BLAIR STONE RD TALLAHASSEE , FL Leon 32399 US Phone Number: 850.487.9832

Previous **Next** **Add** **Cancel**

Name and Personal/Organization Details	Financial Institution Reporting - Maintain Contact Details
	Edit the data and press "Next" to save your changes. Press "Previous" if you do not want to save your changes.
Contact Details	Main Address
Financial Institution Name	*Address:
Application Summary	Street Number: <input type="text" value="2601"/>
	*Street Name: <input type="text" value="BLAIR STONE RD"/>
	Address Line 2: <input type="text"/>
	Address Line 3: <input type="text"/>
	*City: <input type="text" value="TALLAHASSEE"/>
	*State: <input type="text" value="Florida"/>
	*Zip/Postal Code: <input type="text" value="32399"/>
	County: <input type="text" value="Leon"/>
	*Country: <input type="text" value="United States"/>
	Phone Number: <input type="text" value="850.487.9832"/>
	Extension: <input type="text"/>
	E-mail: <input type="text"/>
	<input type="button" value="Next"/> <input type="button" value="Previous"/>

The Financial Institution Name – Information page is where you enter your Financial Institutions. Select the Add button to enter a name.

Name and Personal/Organization Details	Financial Institution Reporting - Financial Institution Name - Information
	Press "Add" to add a new record. Press the "Edit" link to edit an existing record. Press the "Remove" link to remove an existing record. Press "Previous" to return to the previous section. Press "Next" after appropriate details have been entered. Press "Cancel" to cancel this application and return to the main menu.
Contact Details	
Financial Institution Name	
Application Summary	
	Institution Name
	<input type="text"/>
	<input type="button" value="Add"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Cancel"/>

Enter the name of the Financial Institution and click next.

Name and Personal/Organization Details	Financial Institution Reporting - Financial Institution Name - Add
	Press "Next" to save this record and continue. Press "Cancel" if you do not want to save your changes and return to the previous screen.
Contact Details	
Financial Institution Name	*Institution Name: <input type="text" value="TEST BANK"/>
Application Summary	<input type="text"/>
	<input type="button" value="Next"/> <input type="button" value="Cancel"/>

Select the Add button to continue adding more Financial Institutions. Once you have all of them entered you click on the Next button.

Name and Personal/Organization Details	Financial Institution Reporting - Financial Institution Name - Information Press "Add" to add a new record.
Contact Details	Press the "Edit" link to edit an existing record.
Financial Institution Name	Press the "Remove" link to remove an existing record.
Application Summary	Press "Previous" to return to the previous section. Press "Next" after appropriate details have been entered. Press "Cancel" to cancel this application and return to the main menu.

Institution Name	
TEST BANK	Edit Remove
Another Test Bank	Edit Remove

[Add](#) [Previous](#) [Next](#) [Cancel](#)



The Application Summary will let you review your submission. If everything looks good select the Submit button.

Name and Personal/Organization Details	Financial Institution Reporting - Application Summary Please review your information for completeness and accuracy. If errors are identified, click on the "Previous" button to make your corrections. If the information is correct then click on the "Next" button to submit this information.
Contact Details	Review the data and press "Submit" to continue.
Financial Institution Name	Press "Previous" to return to the previous section.
Application Summary	Press "Cancel" to cancel and return to the main menu.

Financial Institution Reporting Summary	
License Type:	Managing Entity
Application Date:	10/20/2017 (mm/dd/yyyy)
Organization Detail:	
Organization Name:	Test Managing Entity
Doing Business As Name:	
Tax Number:	****1836
Entity Type:	
Addresses	
General Addresses	
Main Address	Address: 2601 BLAIR STONE RD TALLAHASSEE , FL Leon 32399 US
	Phone Number: 850.487.9832
Financial Institution Name	
Institution Name	
TEST BANK	Edit Remove
Another Test Bank	Edit Remove

[Previous](#) [Submit](#) [Cancel](#)

Select Yes and click on Submit on the Affirmation page.

[Main Menu](#) | [Update Profile](#) | [Logout](#) | [Contact Us](#)

Managing Entity #MA71729 Logged in as Jones, Michael

Name and Personal/Organization Details	Financial Institution Reporting - Affirmation Press "Previous" to return to the previous section.
Contact Details	Press "Submit" to complete this transaction.
Financial Institution Name	Press "Cancel" to cancel and return to the main menu.
Application Summary	<p>I HEREBY CERTIFY THAT THE STATEMENTS CONTAINED HEREIN ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF, AND TO THE BEST OF MY KNOWLEDGE AND BELIEF I AM ELIGIBLE FOR A MINORITY SCHOLARSHIP UNDER THE CRITERIA SET FORTH IN 473.3065, F.S. ADDITIONALLY, I AM A PERSON OF GOOD MORAL CHARACTER, HAVING A PERSONAL HISTORY OF HONESTY, FAIRNESS, AND RESPECT FOR THE RIGHTS OF OTHERS AND FOR THE LAWS OF THIS STATE AND NATION.</p> <p> <input checked="" type="radio"/> Yes <input type="radio"/> No </p>

[Previous](#) [Submit](#) [Cancel](#)


This will take you to the Confirmation page. You will also receive an email with a PDF of the transaction.

Confirmation

Your information has been submitted. An email has been sent to the email address associated with your DBPR Online Services account. If you do not receive this email you may verify the address where the message was sent by selecting "Main Menu" and then "View User Profile". Updates to where future emails are delivered can be made by selecting the "Edit" function and updating your email address.

Press "Return" to return to the main menu.

[Return](#)

Message  fldbpr_SummaryPDF_DATE171020084616_6756491780541807091.pdf (40 KB)

Hello,

Thank you for submitting your application. Open the attachment to see the application summary.

Adobe Reader is necessary to view the PDF.

Click <http://www.adobe.com/uk/products/acrobat/readstep2.html> to download Adobe Reader.

*** Note: This is an automated email. Do NOT reply to this message.

You have now completed the Financial Institutions Reporting.