Florida Department of Financial Services

Division of Consumer Services

User Guide

Insurance Companies

(Respondent Portal)

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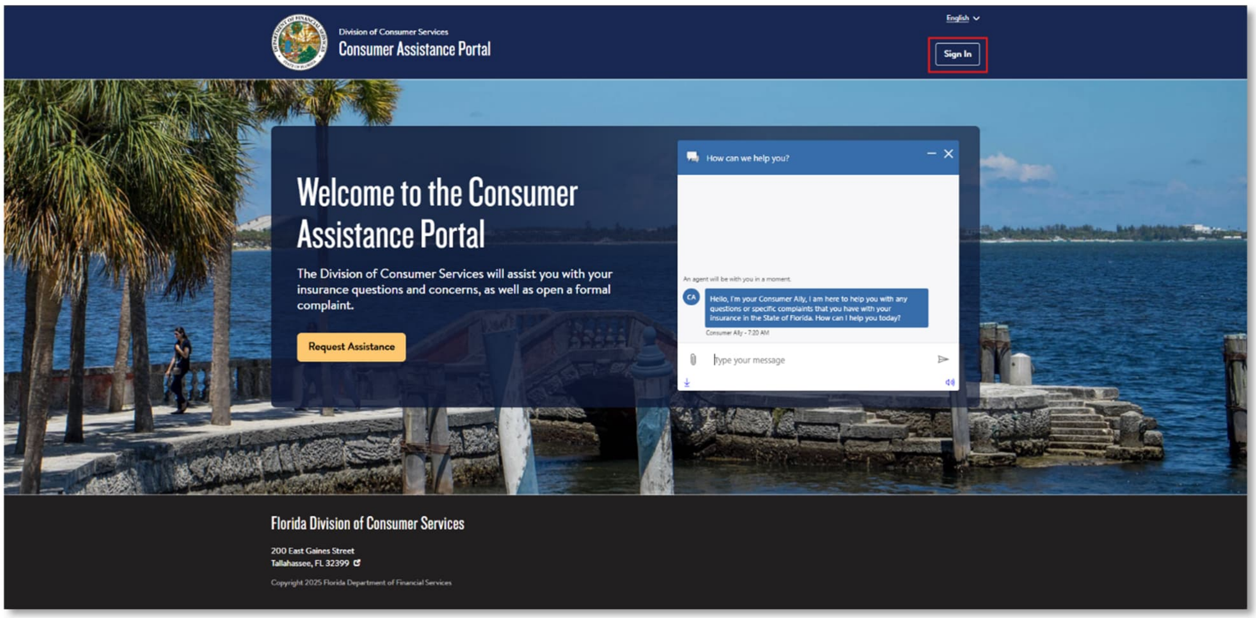
Introduction

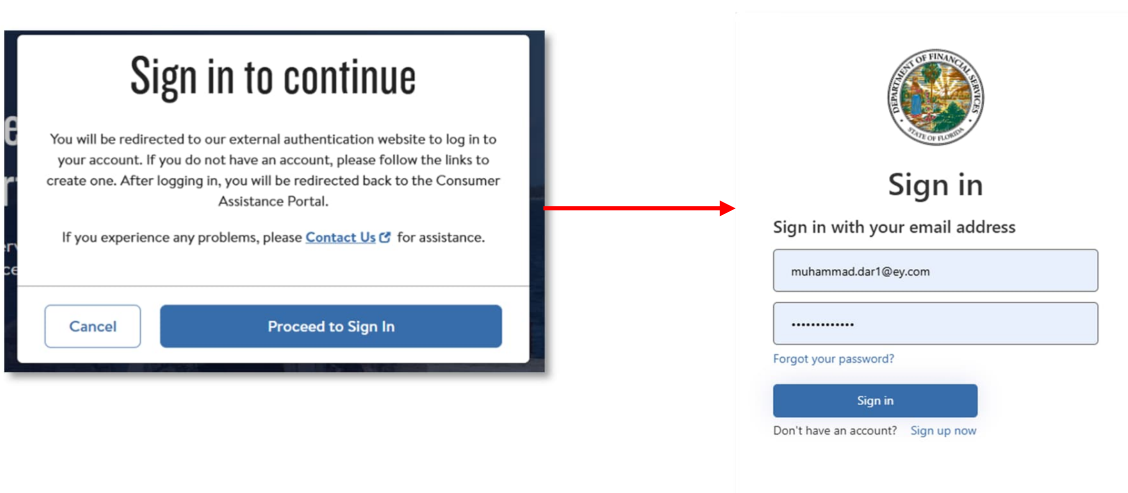
This guide provides insurance companies and agents with fundamental instructions on how to effectively use the Respondent Portal to manage Cases associated with them. Through this portal, users can easily review cases assigned to them, take required actions such as submitting responses or uploading documents, and securely pay invoices associated with their cases. Insurance Companies will also be able to manage their company contacts through this portal. Designed to streamline communication and case management, the Respondent Portal ensures that all parties can efficiently track progress, meet deadlines, and fulfill their obligations throughout the Case.

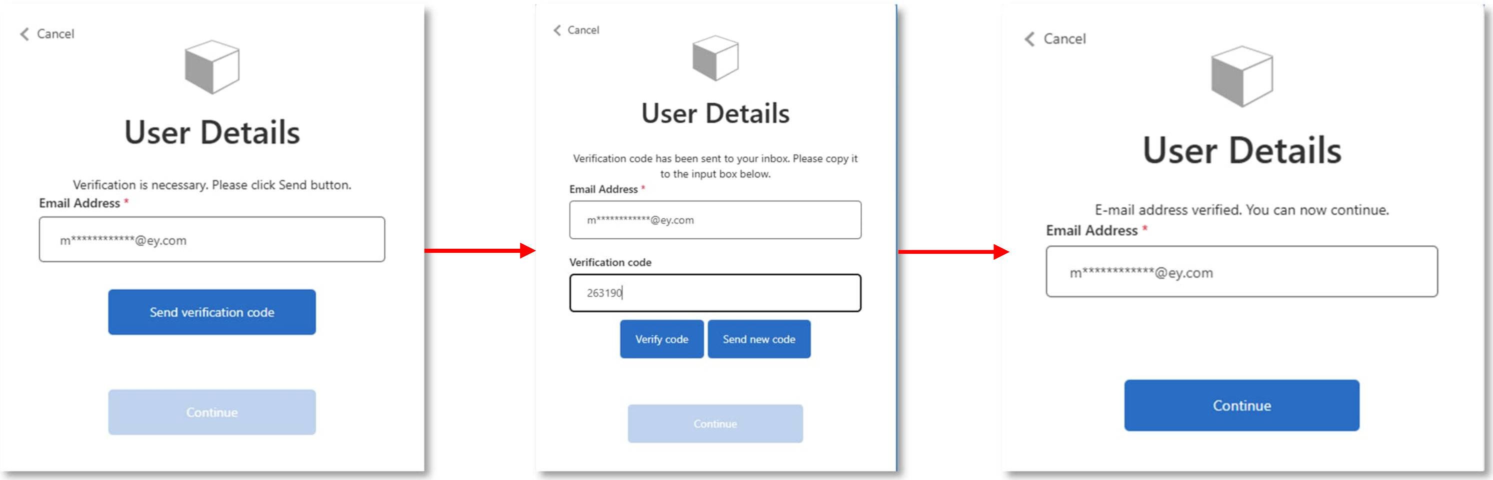
Signing In



Whenever an Insurance Company Representative navigates to the portal, they will land on this homepage, that allows them to sign into the Respondent Portal and view their Cases.

Upon clicking “Sign In”, users will be informed that they will be navigated to an external authentication website to login. **Click** “Proceed to Sign In” to be navigated to the external authentication website. On the Sign in screen, enter credentials and click Sign in as shown below.

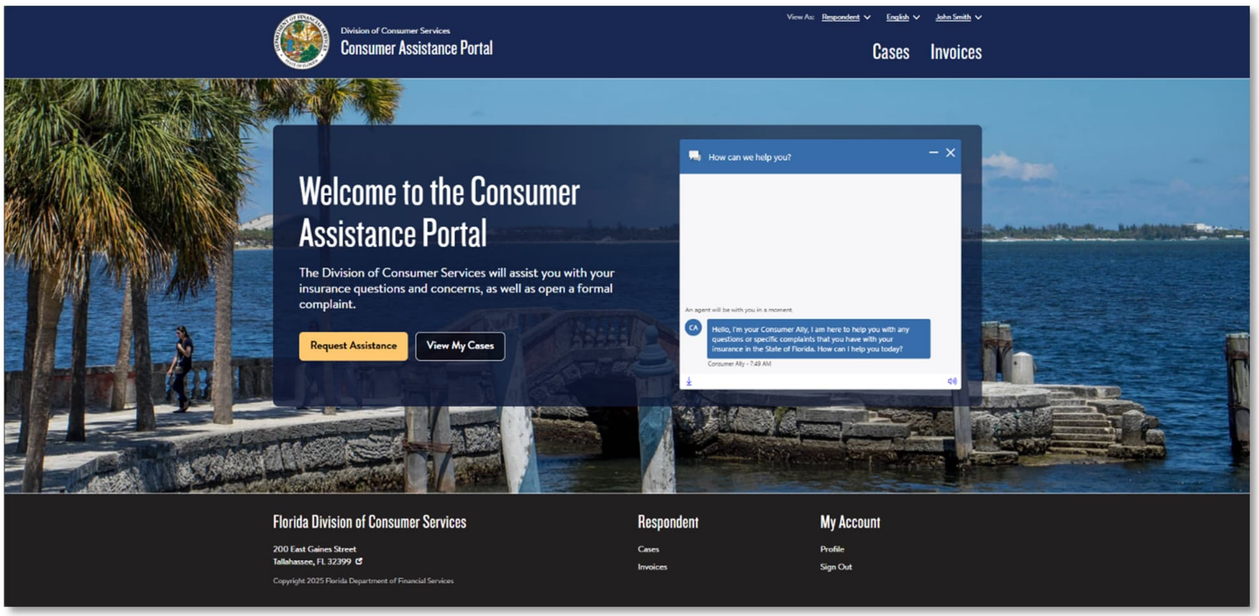




Users will be prompted to verify their email through a verification code. Once they receive and enter the verification code, they will be notified of the verification and prompted to continue with the sign in process. This will navigate them automatically back to the portal homepage signed in.

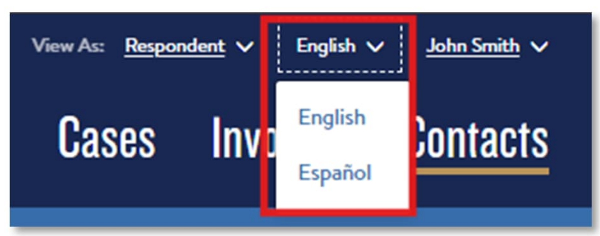
Respondent Portal

Homepage

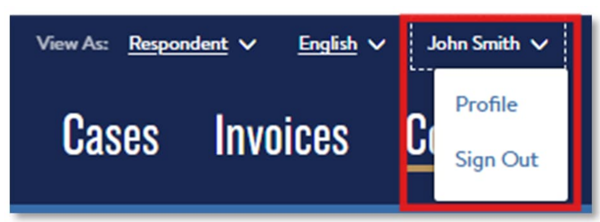


Users will be navigated to the homepage upon signing in, where they can find links to all accessible pages of the portal like the Cases and Invoices tabs, as well as tools to manage their profile and preferences in the portal.

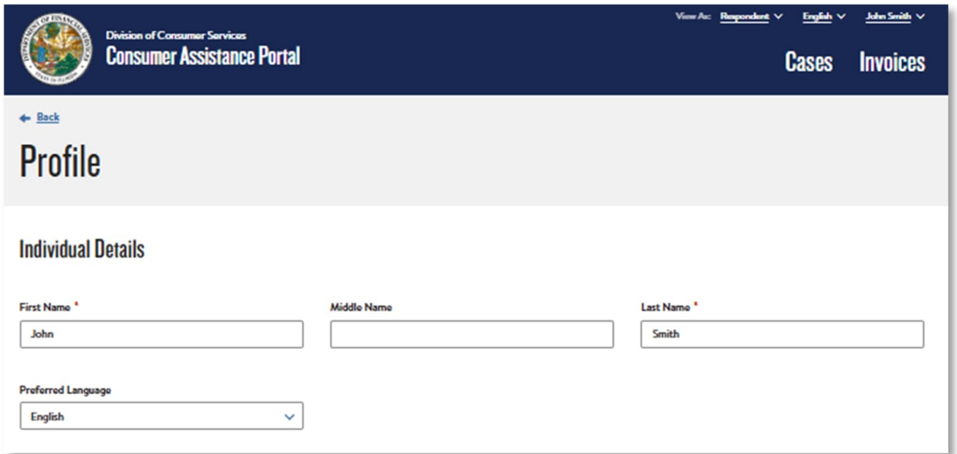
Users will be able to change their **preferred language** between English and Spanish by using the language dropdown menu at the top right corner of the screen.



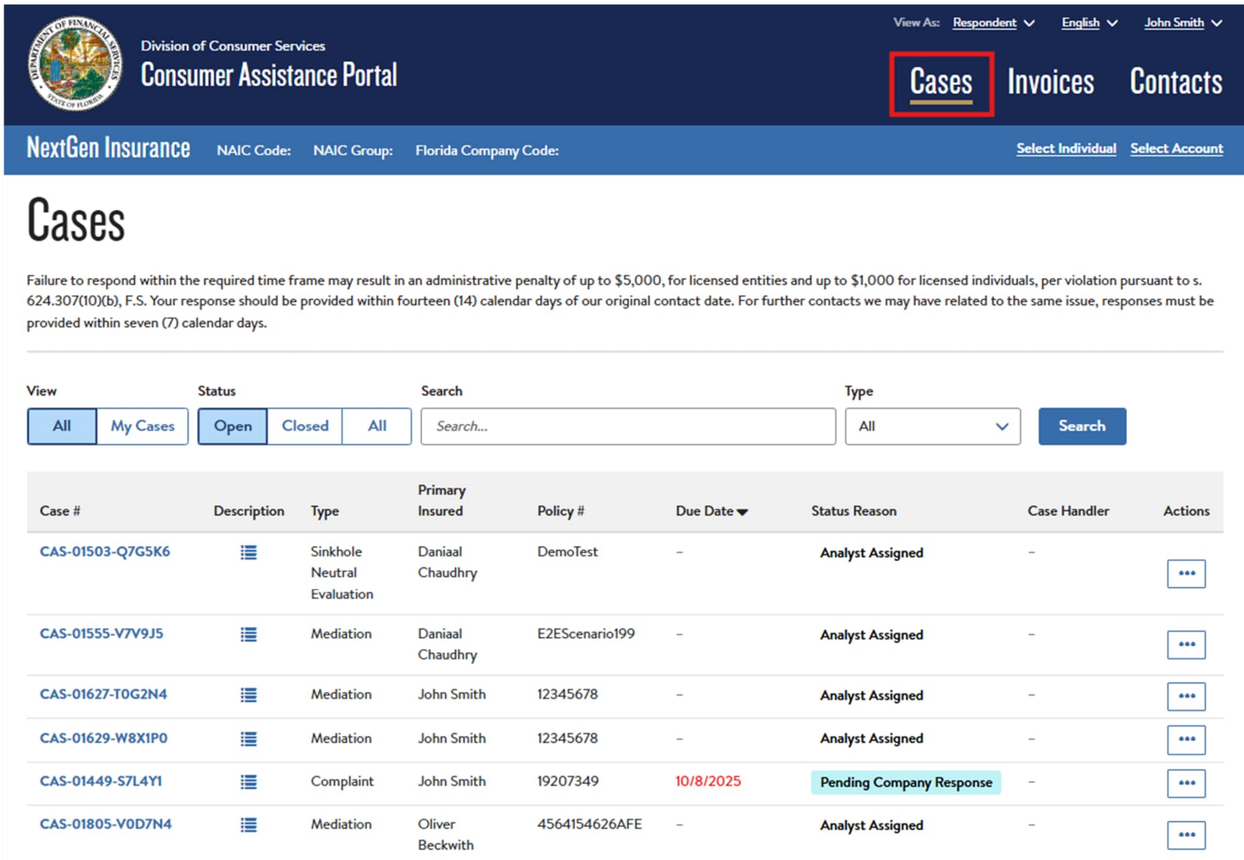
Users will also be able to modify their information within their **Profile.** To navigate to the profile, Representatives can click on their name in the top right corner and click on "Profile" from the dropdown menu.



In their profile, users will be able to modify their name, mailing address, and contact details.

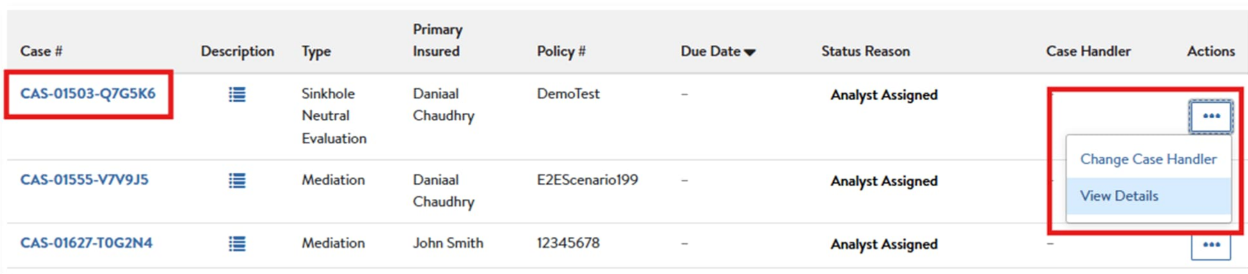

View As: Respondent
English
John Smith
Division of Consumer Services
Consumer Assistance Portal
Cases
Invoices
Back
Profile
Individual Details
First Name *
John
Middle Name
Last Name *
Smith
Preferred Language
English

Cases



Cases tab on the Respondent portal shows all the cases associated with the Insurance Company Representative, or the Insurance Company they represent. These Cases are shown as a list, with columns to help identify essential information regarding the cases without having to click into each one, including information like the type of Case, status of the Case, and a due date for any pending responses required from the Representative.

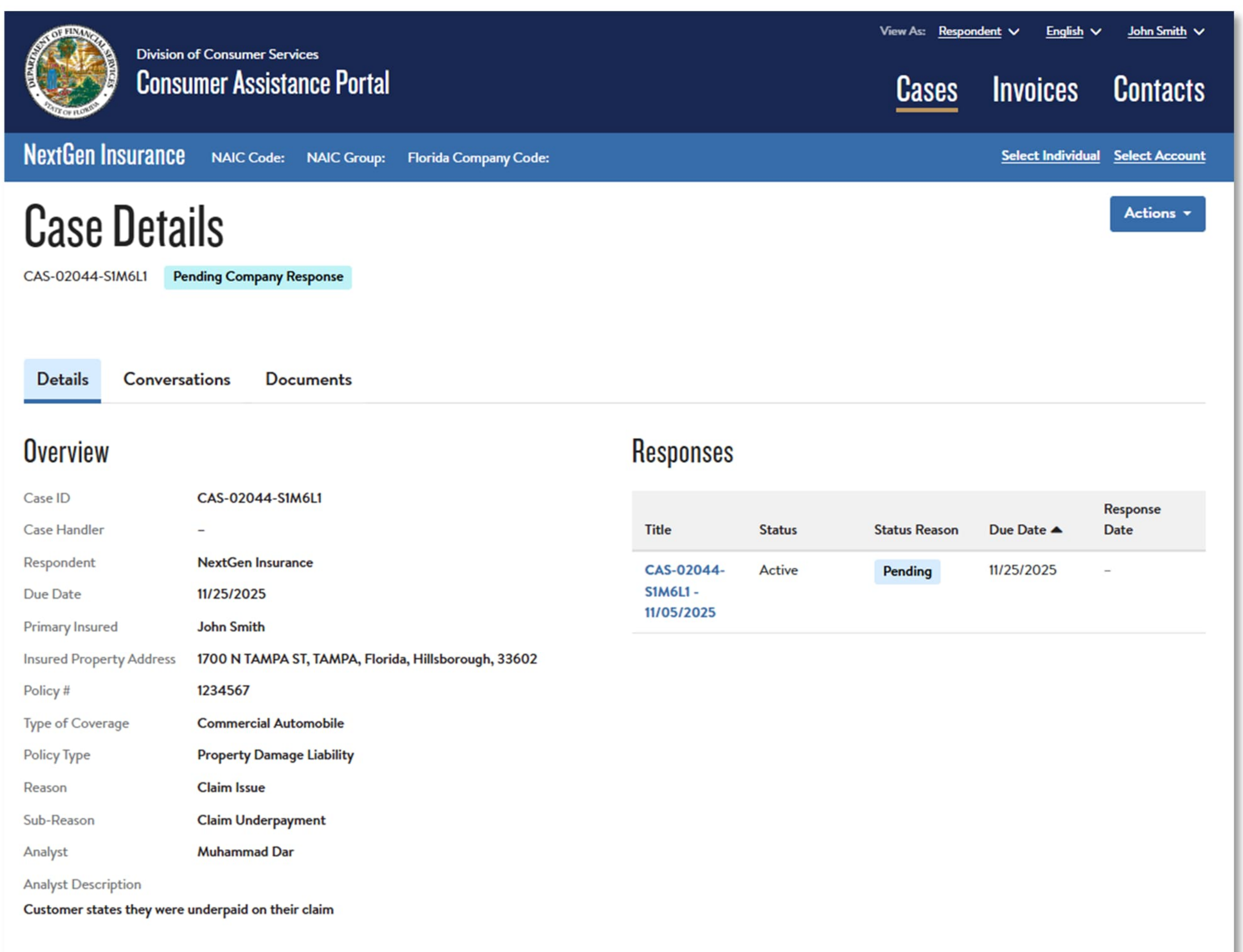
Users can switch the view between all Cases associated with their Company, or just the ones assigned to them using the filter options above the list view of Cases. Users can also filter based on the status of those Cases, i.e. Open, Closed, or All. If users are looking for a specific Case and they have the full or partial Case Number, they can search for it directly using the search bar, and filter on Case type to make their search result more accurate.



To view a specific Case in detail, users can either click on the Case number or use the "Actions" dropdown menu and click "View Details". The Actions dropdown menu also allows Company Representatives to assign or change the assigned Case Handler for a specific Case.

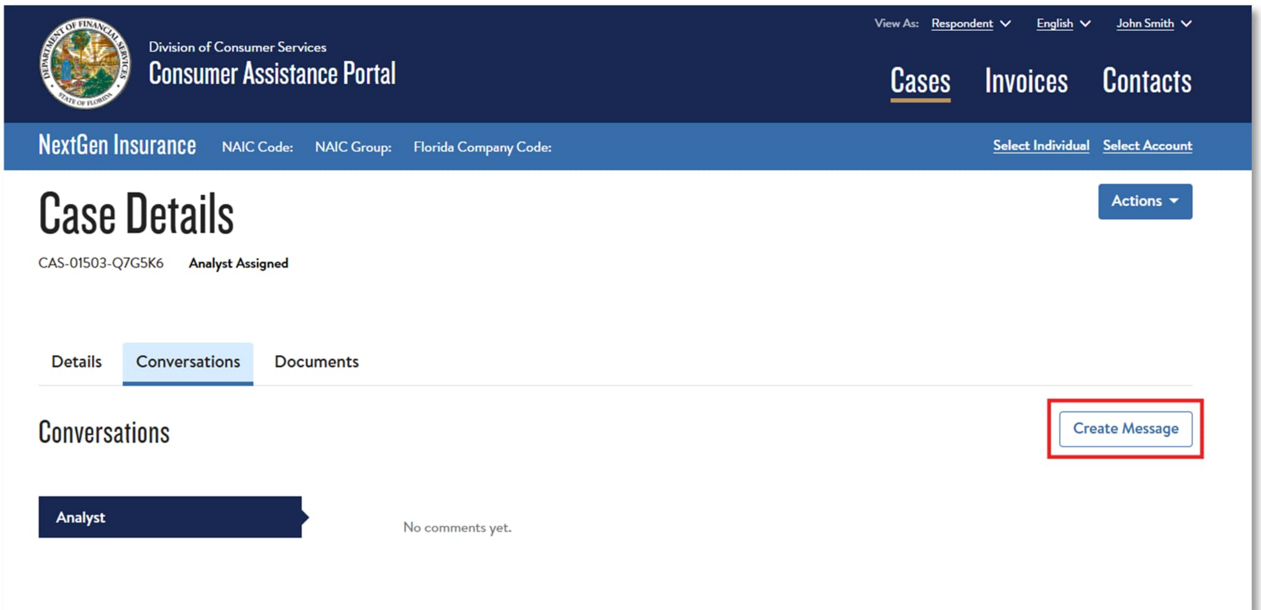
Case Details

Details

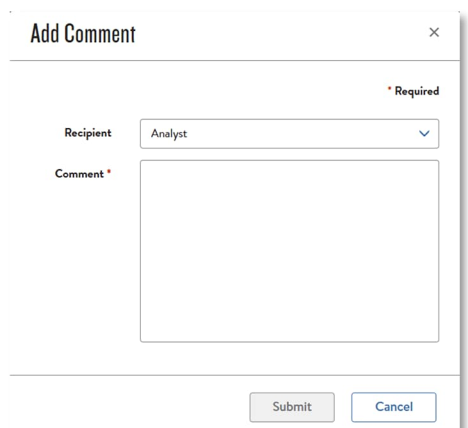


Upon clicking into a Case, users will be brought to the **Case Details** page. This page consists of multiple sections, which become visible based on the Case type, allowing users to manage the Case completely.

Conversations – Portal Comments

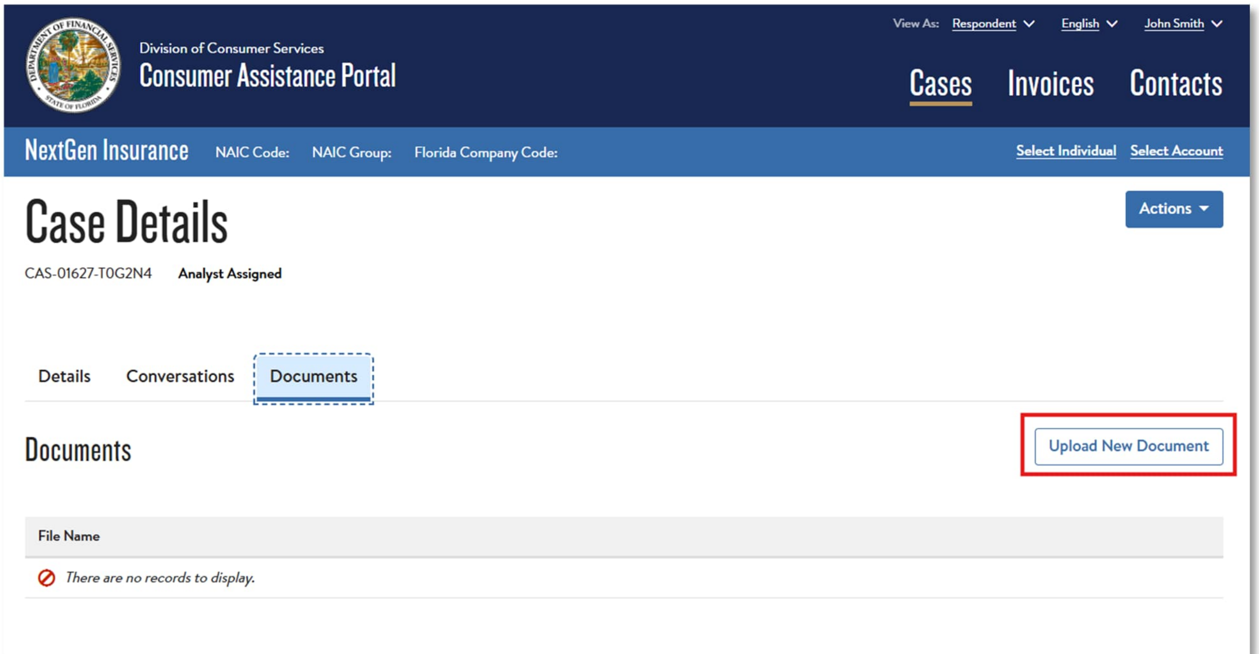


Case Details page also provides a tab for Conversations, which can be used to communicate directly with the Analyst assigned, the Mediator or the Neutral Evaluator from within the Portal, this includes both sending a new message, and responding to any messages received from the external parties. All prior conversations with the external parties can be found within each external party's own tab found on the left side of the screen.

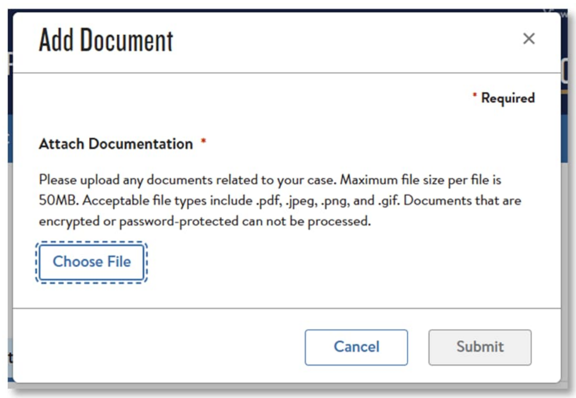


To send a new message, click on the "Create Message" button. This will open a popup window that allows users to select the recipient of the message and enter the message they want to send. Fill out the required fields and click "Submit" to send the message.

Documents



The third tab on the Case Details page is for **Documents.** This tab shows users a list view of all the documents that have been submitted related to the Case being reviewed by all involved parties. To upload a new document, click on the "Upload New Document" button on the right side of the screen. This will open a popup window providing instructions on the file size and types acceptable. Choose a file that adheres to the provided instructions and click "Submit" to finish uploading the document.

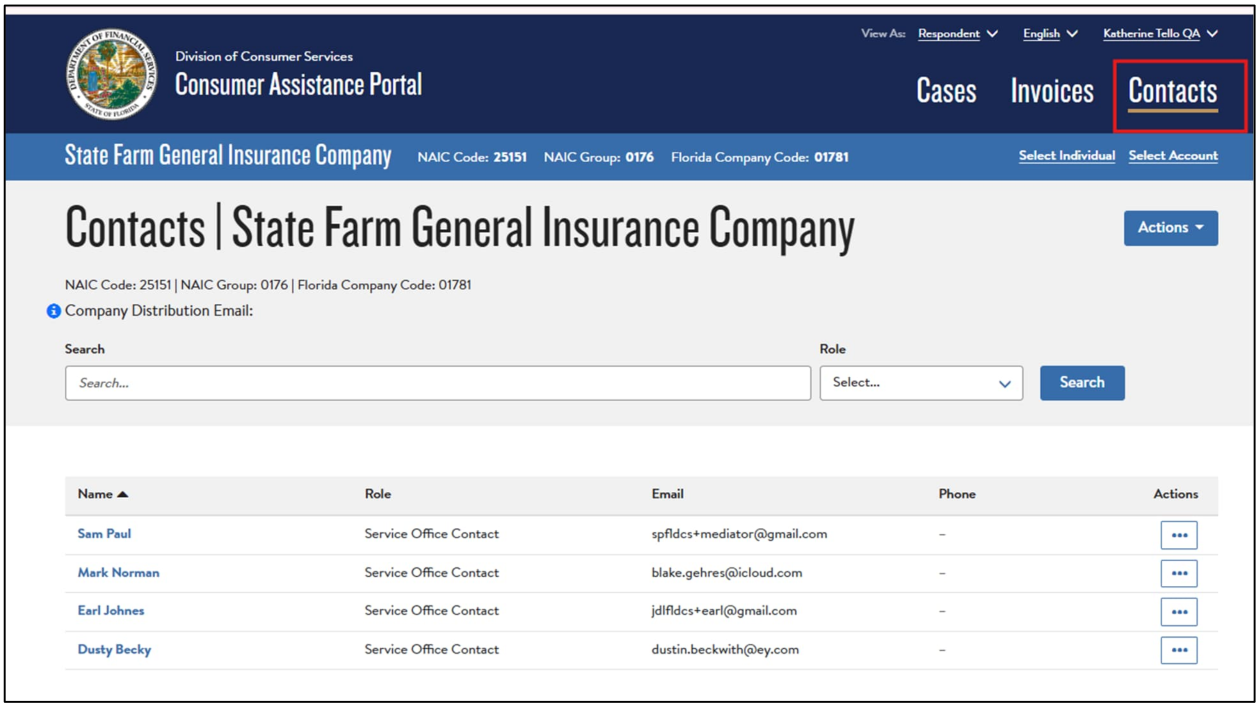


Managing Contacts as a Service Office Contact (SOC)

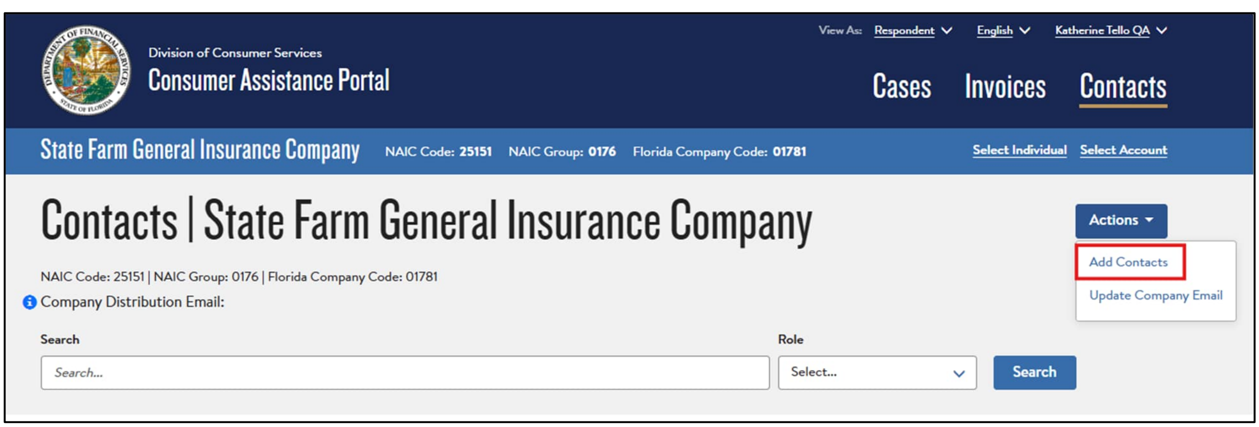
Contacts is a view on the portal that will show all the contacts that are a part of the company. As an SOC you can add, remove and assign roles to contacts.

Add a Contact

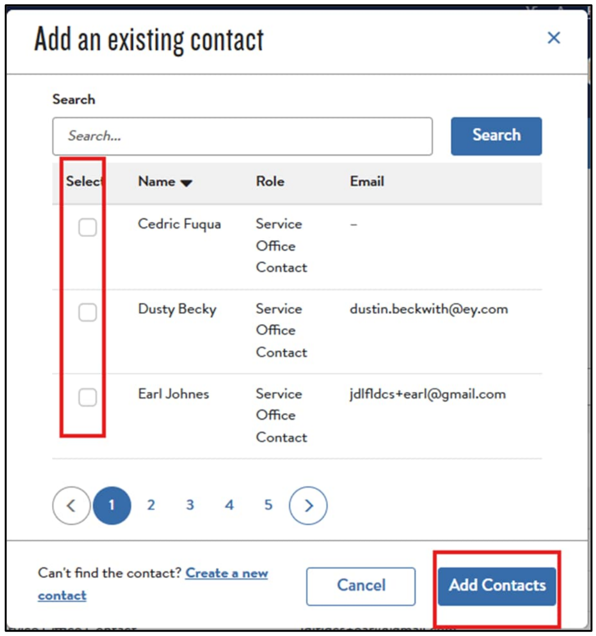
1. Click on the Contacts tab on the portal



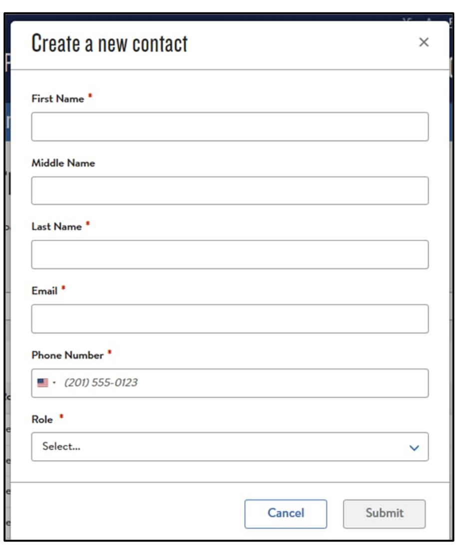
2. Click on the Actions button and click on Add contacts

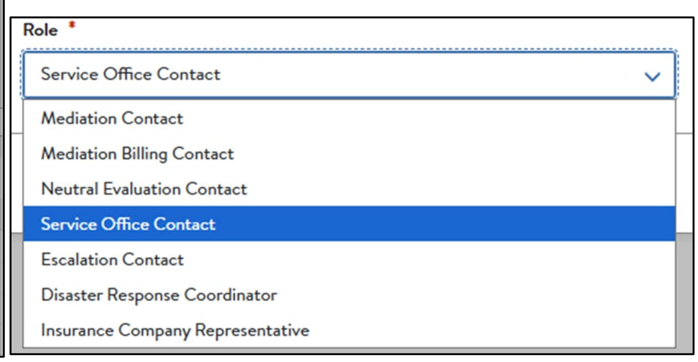


3. Select a contact from the list and click “Add Contacts”



4. If a new contact is needed, click on the “Create a new contact” hyperlink
5. Complete all the required fields and click Submit
    a. First Name
    b. Last Name
    c. Email
    d. phone number
    e. Role

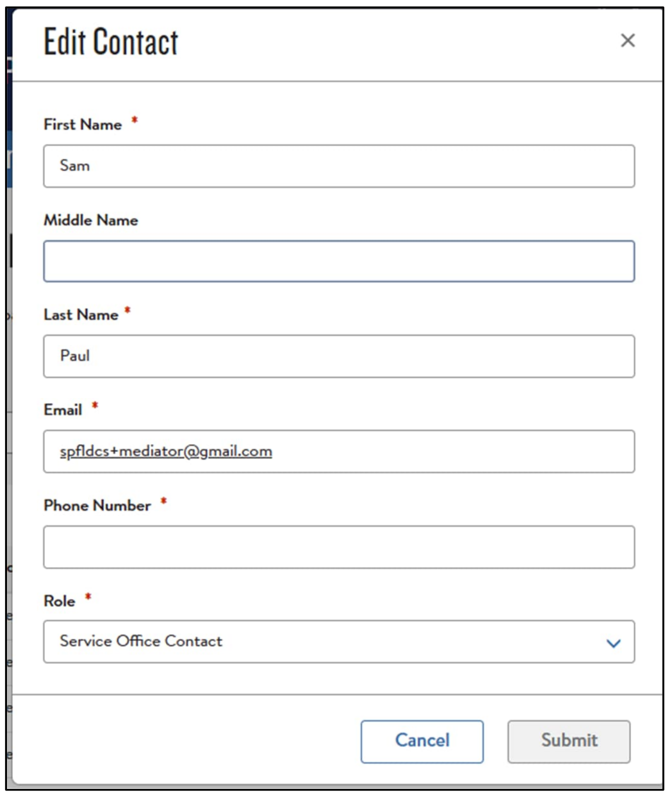




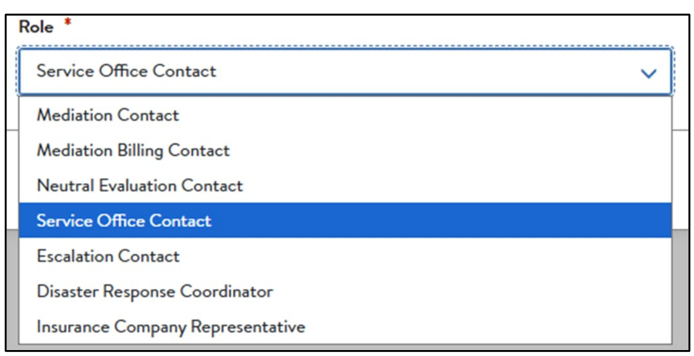
Edit Contact

1. Select Edit from the record you want to edit under Actions

2. Edit the data points needed for the contact



3. Update the role as needed

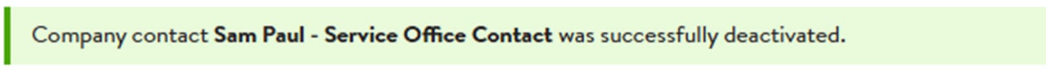


Deactivate a Contact

1. Select deactivate from the record you want to edit under Actions

Name ▲	Role	Email	Phone	Actions
Sam Paul	Service Office Contact	spfldcs+mediator@gmail.com	–	•••
Mark Norman	Service Office Contact	blake.gehres@icloud.com	–	Edit
Earl Johnes	Service Office Contact	jdlfldcs+earl@gmail.com	–	Deactivate
Dusty Becky	Service Office Contact	dustin.beckwith@ey.com	–	•••

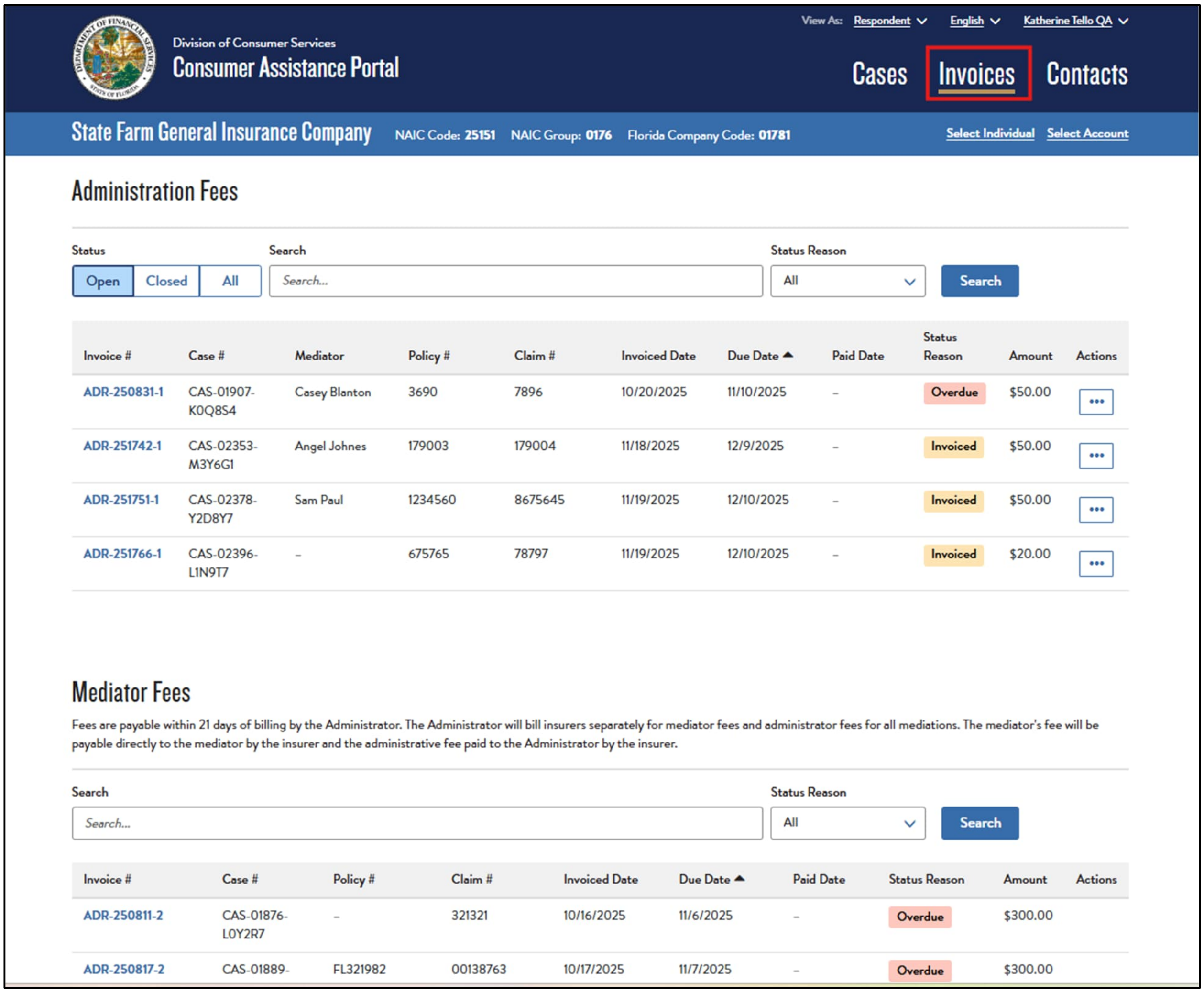
2. Once deactivated a message will appear



Invoices

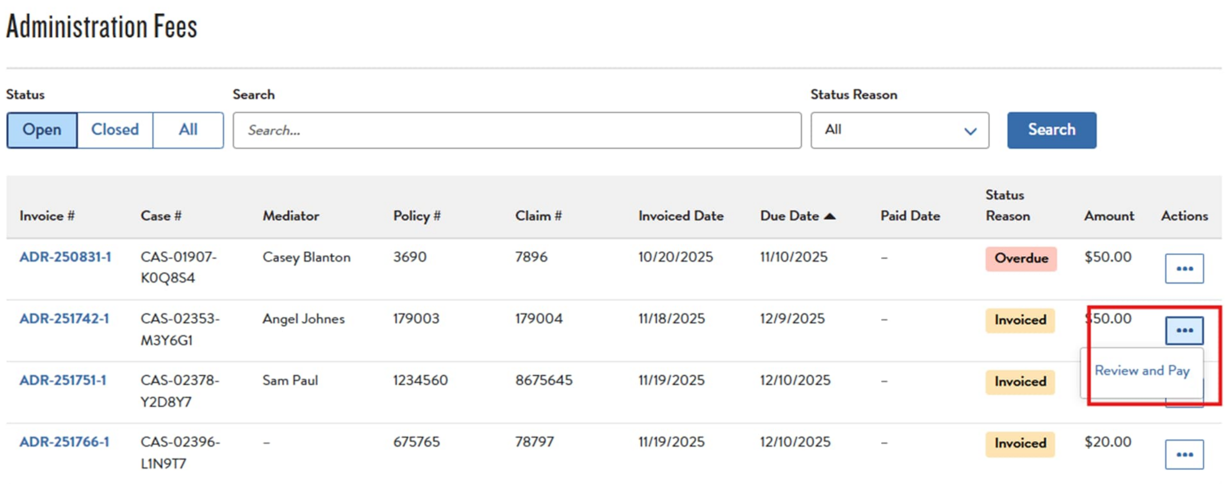
Users can view and pay invoices all in the portal by clicking on Contact tab

There will be two sections that separate out Administration Fees and Mediator Fees



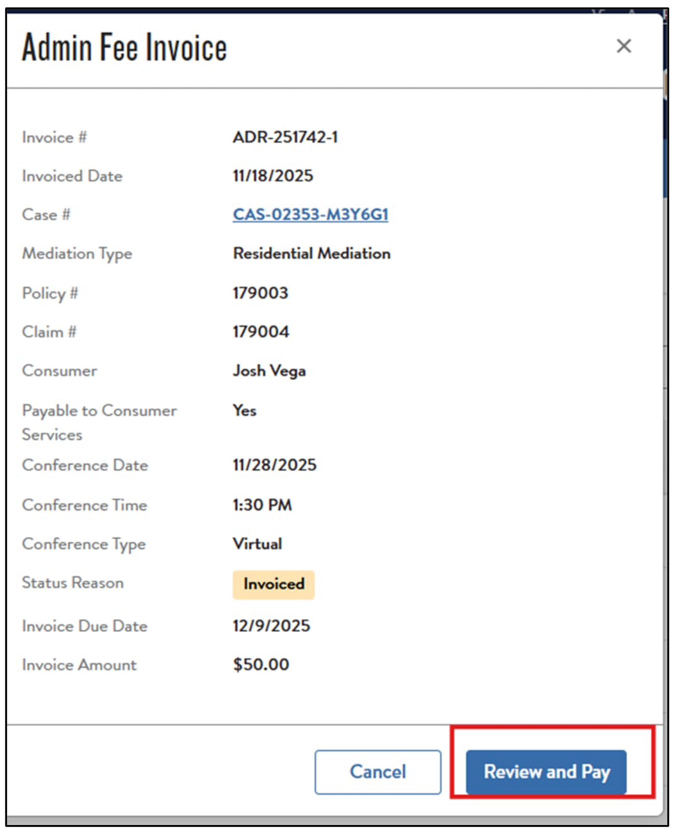
Administration Fees

1. Click on the Review and Pay from the Actions list of the record

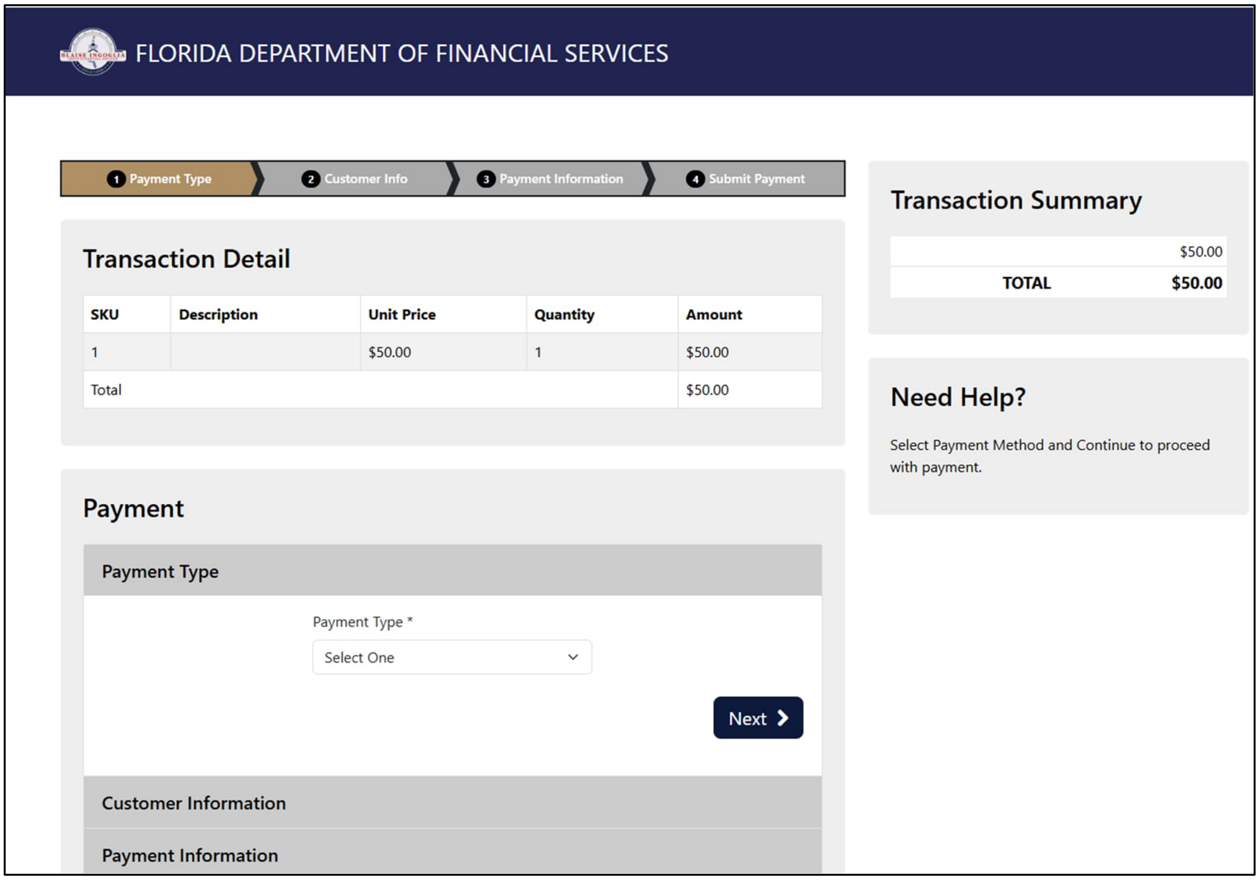


Invoice #	Case #	Mediator	Policy #	Claim #	Invoiced Date	Due Date	Paid Date	Status Reason	Amount	Actions
ADR-250831-1	CAS-01907-K0Q8S4	Casey Blanton	3690	7896	10/20/2025	11/10/2025	–	Overdue	$50.00	•••
ADR-251742-1	CAS-02353-M3Y6G1	Angel Johnes	179003	179004	11/18/2025	12/9/2025	–	Invoiced	$50.00	•••
ADR-251751-1	CAS-02378-Y2D8Y7	Sam Paul	1234560	8675645	11/19/2025	12/10/2025	–	Invoiced		
ADR-251766-1	CAS-02396-L1N9T7	–	675765	78797	11/19/2025	12/10/2025	–	Invoiced	$20.00	•••

2. Confirm that is the record to be paid and click on "Review and Pay"



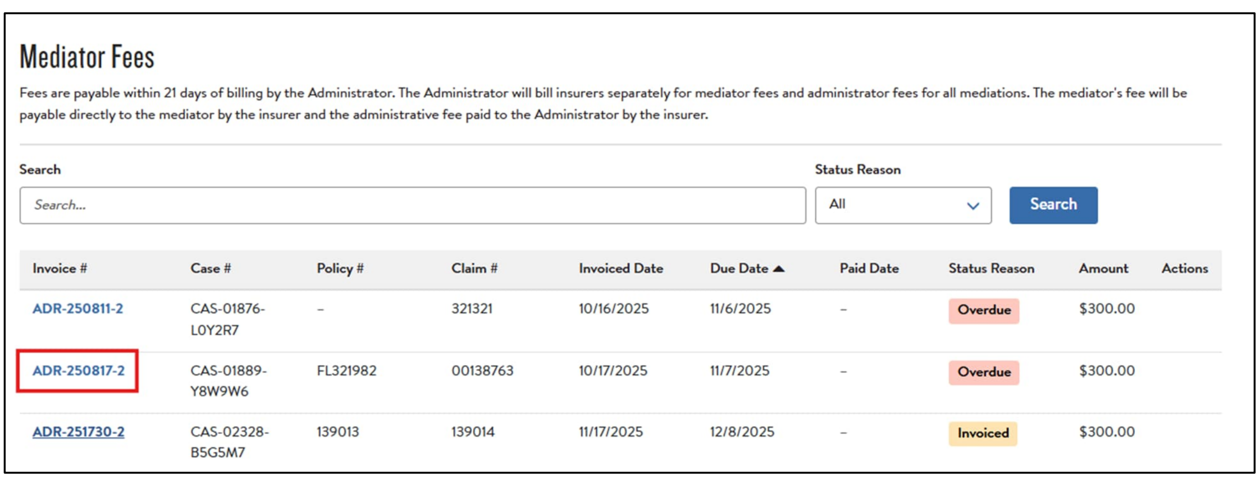
3. User will be redirected to a secure checkout with the Florida Department of Finacial Services



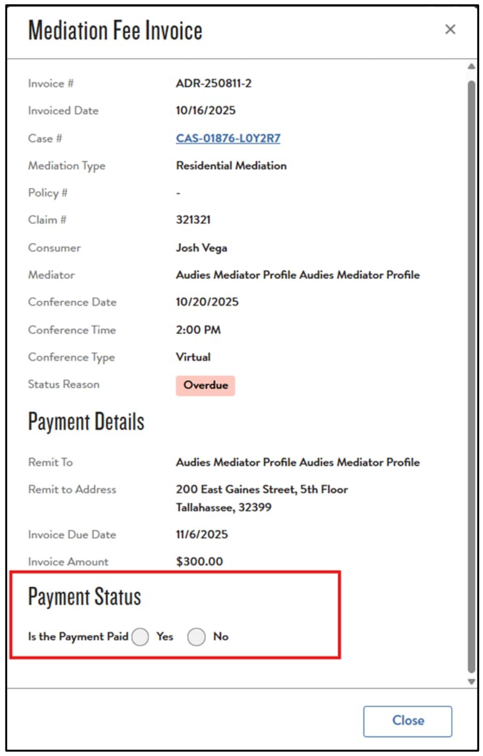
Mediator Fees

Fees are payable within 21 days of billing by the Administrator. The Administrator will bill insurers separately for mediator fees and administrator fees for all mediations. The mediator's fee will be payable directly to the mediator by the insurer and the administrative fee paid to the Administrator by the insurer.

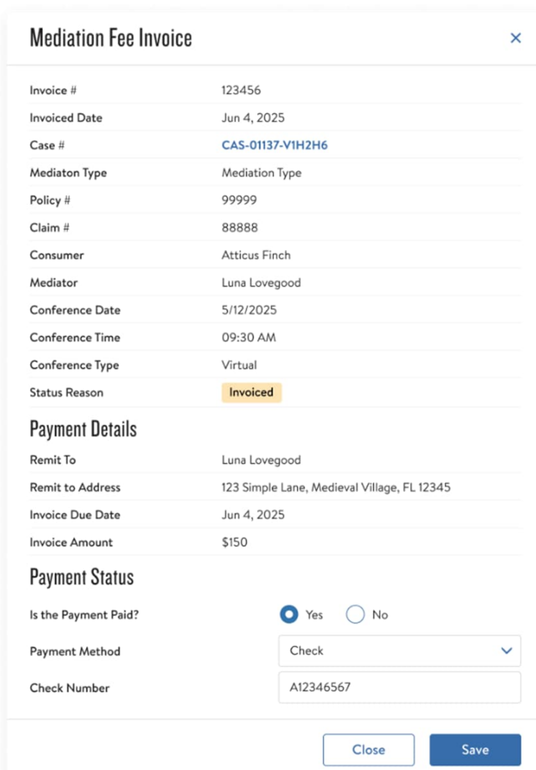
1. Select a record from the Mediator Fees list



2. Select Yes or No to provide the Payment Status



If user selects “Yes” the Payment Method and Check Number field will appear, click Save



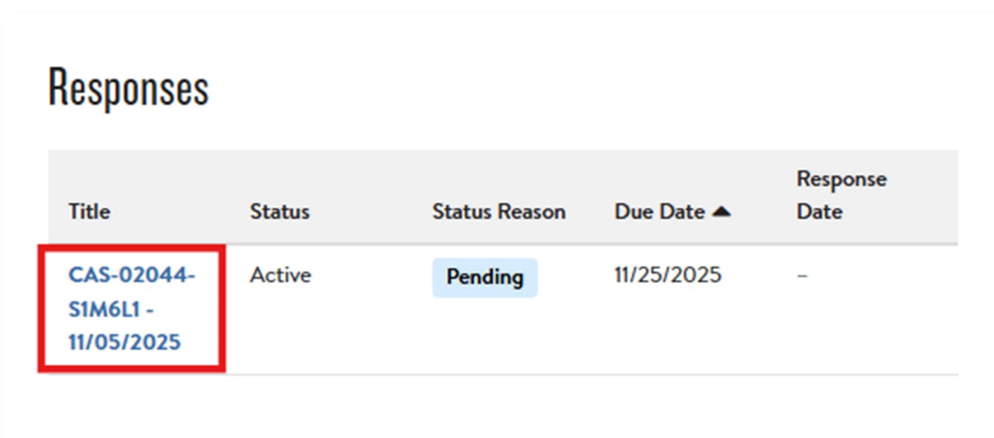
Managing a Case

How an Insurance Company Representative or Agent manages a Case in the Respondent portal depends on the Case type they are managing, as this would determine the steps they take to resolve Cases. The different sections of the Details tab on the Case Details page represent these steps, and provide the information and tools required to complete them.

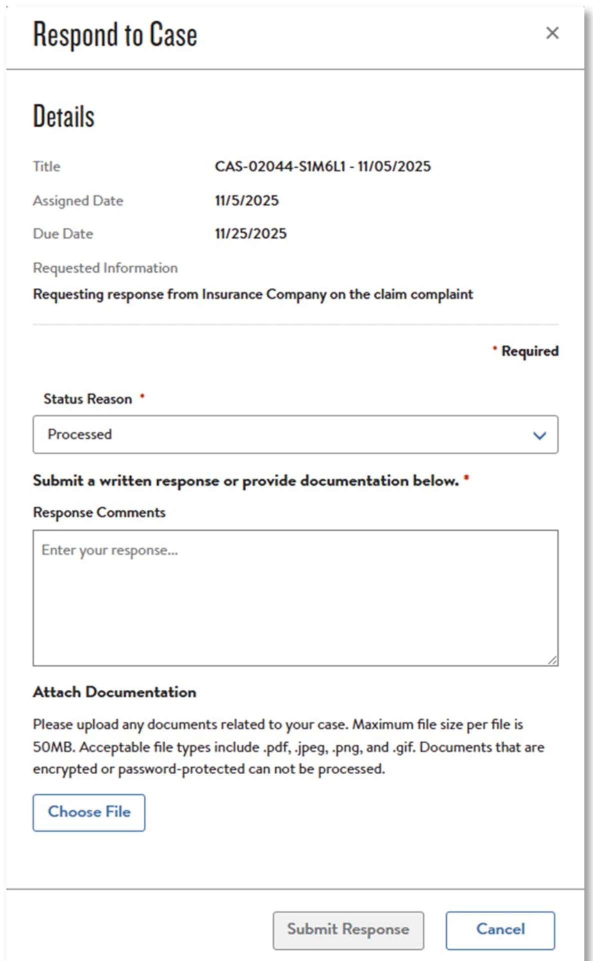
1. **Responses:** This section holds the Response Tracker, used as the first point of contact with the Insurance Company by the Analyst assigned when a Complaint is submitted by a Consumer. Users in the Respondent Portal would use this as a way to accept the Case and provide explanation and documentation on their stance. It can also be used to decline the Case if it is determined that the Company has been incorrectly listed on the complaint.
2. **Invoices:** This section presents the final step of managing a Mediation Case. Once a resolution has been reached and the Analyst assigned has closed the Claim, this section gets populated by the Invoices that are generated and sent to the Insurance Company. This signals the user navigate to the Invoices tab to review and pay the invoices received.

Responding to the Letter

When a complaint is submitted by a Consumer, the Analyst assigned will request an initial response from the Insurance Company listed in the complaint by the Consumer. In doing so, the Analyst will provide some details regarding the complaint, as well as an explanation for what they need in response from the Insurance Company.



- Click on a case from the Cases view page
- Click the hyperlink under the Responses section OR click the Actions button and select Submit Response.
- This will open a popup window as shown below.
- This window shows the date response was requested, as well as the due date. It also shows the information requested.
- To respond, users need to select one of the following Status Reason from the dropdown menu
    - Processed, Declined, or Incorrectly Assigned.

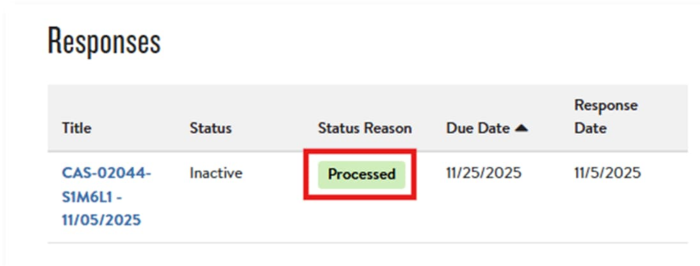


- Users can then provide a written response to the requested information, or attach a document, or both. Click “Submit Response” to finish responding to the request.

If Status Reason = Incorrectly Assigned:

- Select Incorrectly Assigned from the Status Reason dropdown.
- Select No for Does this Case involve the company listed?

- Select Yes for Do you know the correct Company?
- Search for the correct company and select the radio button.
- Attach a file.
- Click Submit Response.
- Once the response is submitted, users will see the Status Reason of that response request in the Responses section change to the one they selected when submitting their response, indicating successful submission.


Responses

Title	Status	Status Reason	Due Date	Response Date
CAS-02044-S1M6L1 - 11/05/2025	Inactive	Processed	11/25/2025	11/5/2025

Neutral Evaluator Cases

How to Propose a Neutral Evaluator

- Click the Case link from the email notification sent notifying a neutral evaluator has been proposed.
- Navigate to the Conversations tab to view the portal comment.
- Return to the Case Details Page and locate the Neutral Evaluator Proposals section.
- Click on the Propose button.
- Select a Neutral Evaluator from the list and click Submit.
- Verify that the proposal appears in the Neutral Evaluator Proposals section.

Accepting the Proposed Neutral Evaluator

- Navigate to the Case Details Page and locate the Neutral Evaluator Proposals section.
- Click View Proposal in the Actions column.
- Select Agree and click Submit.
- Portal comment confirms conditional assignment and further communication will follow.

Disagreeing with the Proposed Neutral Evaluator

- Navigate to the Case Details Page and locate the Neutral Evaluator Proposals section.
- Click View Proposal in the Actions column.
- Select Disagree and click Submit.
- If no agreement is reached within 14 days, a Neutral Evaluator will be randomly assigned.

FAQ

- Q1: What if I cannot find the correct company when selecting Incorrectly Assigned?

A: Select No for Do you know the correct Company? and submit without selecting a company.

- Q2: Can I attach multiple files when responding to a letter?

A: Only one file per response is allowed. Submit another response for additional files.

- Q3: How do I know if my Neutral Evaluator proposal was submitted successfully?

A: It will appear in the Neutral Evaluator Proposals section on the Case Details page.

- Q4: What happens if both parties disagree on the proposed Neutral Evaluator?

A: After 14 days, the system will randomly assign a Neutral Evaluator.

- Q5: Who receives notifications about case updates?

A: Notifications are sent to the Insurance Company SOC, Consumer, and Neutral Evaluator (once assigned).