



## NORTH CAROLINA BOARD OF FUNERAL SERVICE

### An Important Message For PreNeed Establishments!

The NC Board of Funeral Service has opened the online portal for the preparation and submission of your 2023 Preneed Annual Report at [www.ncbfs.org](http://www.ncbfs.org). Please review these instructions for guidance on proper completion of the Report. We recommend that you print these instructions so that you can refer to them once you open your establishment's report.

Please click on this link to access your 2023 Preneed Annual Report:

[https://ncbfs.igovsolution.net/online/User\\_login.aspx](https://ncbfs.igovsolution.net/online/User_login.aspx)

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#### **Verification of Account Balances**

Please provide the year-end insurance or bank trust balance for every preneed contract beneficiary in your client listing as of December 31, 2023. You may refer to the reports provided to you by the insurance companies and/or financial institutions to complete this information.

Many contracts sold in calendar year 2023 will not have a bank account and/or insurance policy number. If applicable, you must provide this information when completing your report.

#### **Updating and Editing the Annual Report**

You may select the icons for either “**Edit Insurance**” or “**Edit Bank**” on the far right-hand side of the page to **Edit** the insurance or bank information. When the new page opens, you’ll find detailed instructions for editing and adding entries as well as deleting any duplicate entries that have been reported on your report.

Please use the “**Add Comments/Upload documents**” column in the “**Beneficiary Details**” section which allows you to either add comments or upload documents if necessary. Your comments and documents will be included with your submission of the report so that Board staff can access them.

If one of your preneed clients is not on the Report, please provide the name of the client in the “**Missing Contract Information**” section. This will provide an alert to Board staff and will be reviewed in a timely manner to determine why the contract is not listed on the report.

#### **Sorting Entries**

To sort the records by insurance or bank name, look for the two blocks at the top of the page titled “**Insurance Name**” or “**Bank Name.**” Click on the dropdown arrow to open a listing of banking or insurance institutions. To sort the beneficiary listings by alphabetical order, click on the blue header for “**First Name or Last Name**” at the top of the column.

To **Search** for a specific record, click the word “**Filters**” for the appropriate column. A box will appear and surround the word “**Filters**.” Type in the First Name, Last Name or NCBFS Account Number to search for a specific record. **Be sure you do not hit “Enter” after typing in your search information.** Once you type in the information, the system will immediately respond.

### **Helpful Tips**

- Please click the “**Print Annual Report**” instead of “**Submit Final Report**” if you wish to produce a hard copy of the report which you can complete manually rather than online.
- You can convert and view your Annual Report to an Excel spreadsheet or PDF format if you wish. Please click the Excel or PDF icon in the bottom right-hand page of your Report.
- You may suspend your work on the Annual Report and then resume at a later time so long as you have not selected “**Submit Final Report.**”
- Once you have selected “**Submit Final Report,**” you will have an option to “**Download My Annual Report.**” Please select this option. You also have an option to print your completed Report. Remember that you are required to maintain your 2023 Preneed Annual Report for at least ten [10] years.
- If you are resetting your Password, be sure that you copy and paste the temporary password that will be sent to you by email. Our system may not recognize a temporary password if it is typed in.
- If a contract is showing as active but has been performed, transferred, revoked, or otherwise is no longer in force, please select “**Edit Contract Status**”. Please make sure and provide the date of death or the date of closure.

### **Certification**

You can complete the Certification information shown on the Report without any requirement for it to be notarized. A corporate officer or location manager signature is sufficient to certify the Annual Report.

### **Duplicate Entries/Records**

If you determine that there are duplicate entries or records, please delete them by clicking on the “trashcan” icon.

## **Due Date!**

Your Preneed Annual Report ***must be received*** on or before March 31, 2024.

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### ***Need Assistance?***

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