



An Important Message For PreNeed Establishments!

The NC Board of Funeral Service has opened the online portal for the preparation and submission of your 2020 Preneed Annual Report at 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 2020 Preneed Annual Report:

https://ncbfs.igovsolution.net/online/User_login.aspx

▪ **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, 2020. 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 2020 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 “**Insurance**” or “**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 indicating duplicate entries.

Please use the “**Edit**” icon in the “**Beneficiary Details**” section which allows you to add comments if necessary. Your comments will be included with your submission of the report so that Board staff can access them. For example, if you have performed a contract but the contract is still listed as “active” according to your Annual Report, please enter the date of death as the “**Closed Date**” in addition to uploading a Certificate of Performance. You cannot enter a “**Closed Date**” without providing supporting documentation.

Before submitting your Annual Report, please report any discrepancies that you noticed in the “**Final Comments**” section. For example, if one of your preneed clients is not on the Report, please provide the appropriate information before submitting.

- **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. If you have an insurance company that does not appear in the listing, you will need to upload a supporting document showing that your establishment has secured an assignment or beneficiary designation from that particular institution.

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.

Helpful Tips

- Please click the “**Print Annual Report**” instead of “**Submit Annual 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 Report and then resume at a later time so long as you have not selected “**Submit Annual Report**.”
- Once you have selected “**Submit Annual 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 2020 Preened Annual Report for at least ten [10] years.

Certification

You must submit a notarized Certification to the Board upon completion of the Annual Report under “**Annual Report Certification**.” A corporate officer or the location manager may certify the Annual Report.

Due Date

Your Preened Annual Report ***must be received*** on or before March 31, 2021.

Need Assistance?

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