

2023 CFL Annual Report – Frequently Asked Questions

1. *I forgot my Username and/or Password, who should I call?*

Please contact (866) 275-2677, or email CFL.AnnualReport@dfpi.ca.gov and reference “username and/or password” as the issue during the call, or in the subject line of your email.

2. *Where do I find the 2023 CFL Annual Report?*

You must sign into the self-service portal at <https://docqnet.dfpi.ca.gov/> and select “**Annual, Liability, & Industry Survey Reporting**” from the dropdown menu on your account name, located at the top right corner of the screen once you’re signed in.

3. *Where do I find the instructions for the 2023 CFL Annual Report?*

At the following link: <https://dfpi.ca.gov/wp-content/uploads/sites/337/2022/01/CFL-2021-Annual-Report-Instructions.pdf>

4. *Can I save my work and continue at another day to complete it?*

Yes, any time you click on the “Save” button on the screen your work is saved. You may come back and continue completing it at a later time.

5. *Can I submit the report in a paper form?*

No, the report must be completed online only.

6. *How do I print the report?*

On the **ANNUAL, LIABILITY & INDUSTRY SURVEY REPORTING** screen, click on “CFL Annual Reports” on the left side of the page, and then click on “[View PDF]” link beside the Report Name. It will generate the pdf form of the report which you can print at any time.

7. *Can I surrender my license in lieu of filing the 2023 Annual Report?*

Yes, you may surrender all licenses (main/branch) held by the company in lieu of filing before March 15, 2024.

8. *How do I request for extension in submitting the annual report?*

Extensions are not being granted in filing the report. All licensees must submit the report on time.

9. *How do I amend the annual report once it is submitted?*

Please contact (866) 275-2677 or email CFL.AnnualReport@dfpi.ca.gov and ask for a change of annual report status. You must provide the Report Name or ID of the annual report that needs a status change.

10. I obtained the CFL license in 2024, do I need to submit the 2023 Annual Report?

No. You do not have to submit the annual report if your CFL license is not active as of December 31, 2023.

11. Do we need to submit an annual report for each branch or just one report for the entire company?

You only need to complete one report for the entire company. Activities of all the branches must be included in the main office's annual report.

12. I need a template to gather the data I am going to enter into the screens online.

On the "Annual, Liability, & Industry Survey Reporting" screen, you will find the link "[Download Blank Form for CFL Annual Report](#)". Click on the link and print the blank form. You can also download a blank form for the CFL Annual Report from the following link: https://dfpi.ca.gov/wp-content/uploads/sites/337/2022/01/2021-CFL-Blank-Form_FINAL.pdf.

13. If I have a specific question about an item in the annual report, who do I contact?

You may contact (866) 275-2677 or email CFL.AnnualReport@dfpi.ca.gov and reference the specific item/section of the Annual Report where you are having an issue during the call, or in the subject line of your email.