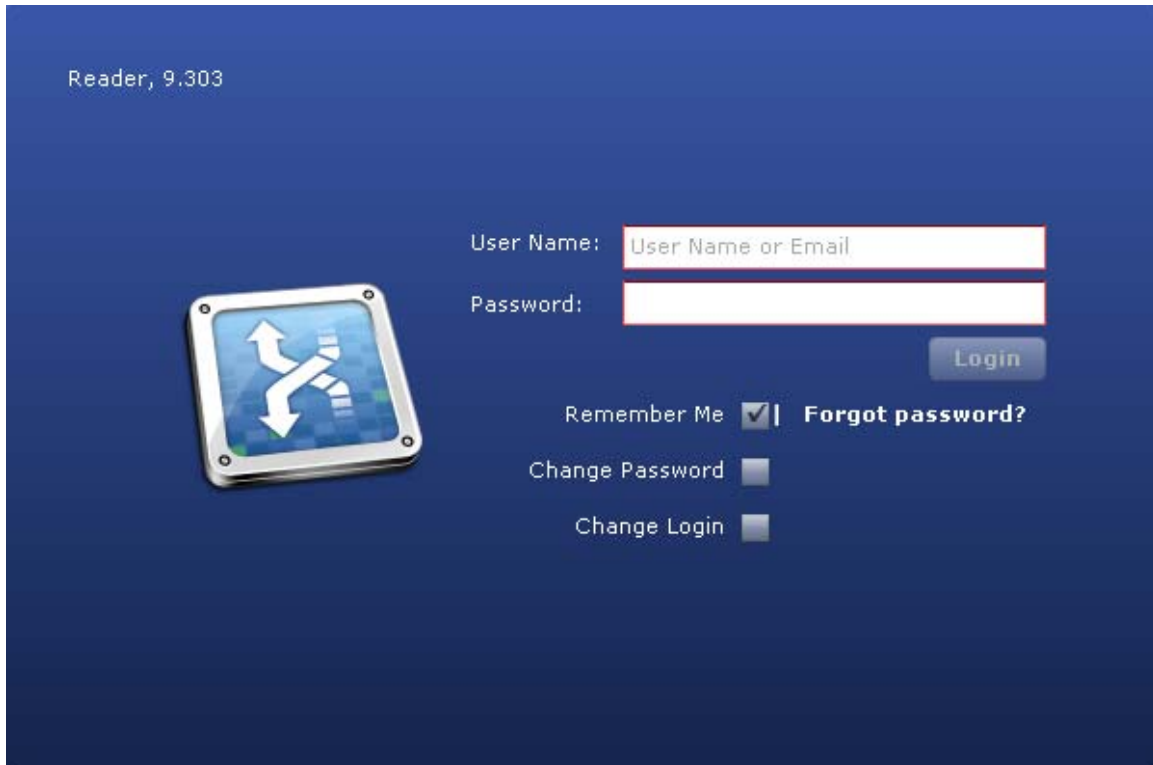


Information on SureLC by SuranceBay

Below are screenshots and descriptions of the common functions BGA's and producers will go through in using SureLC.



Reader, 9.303

User Name:

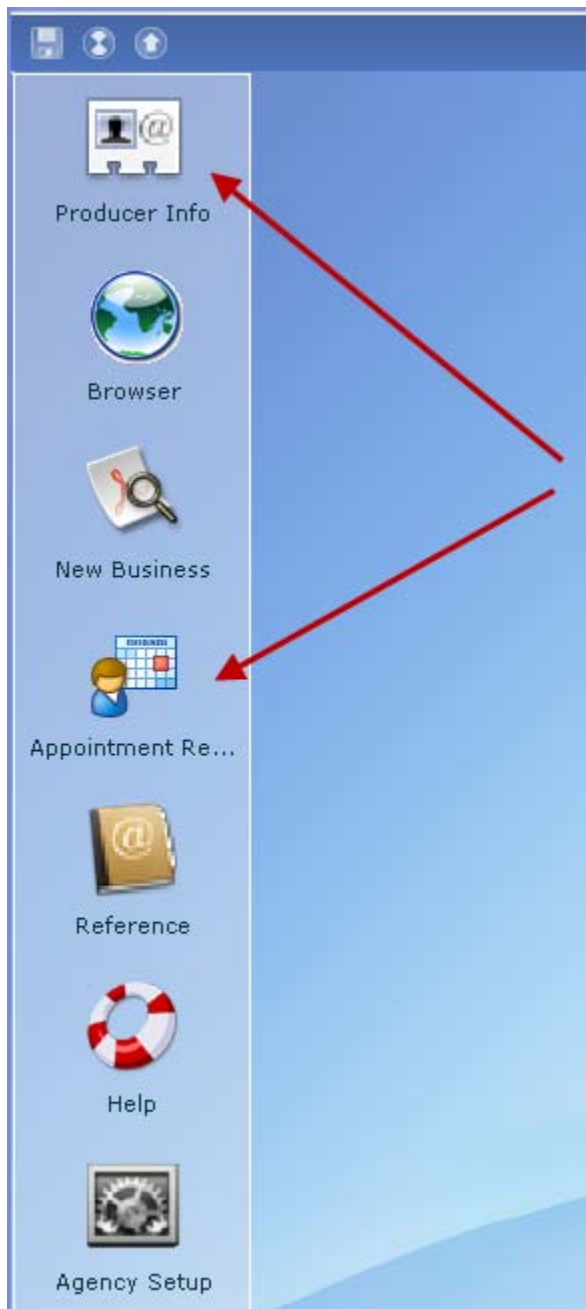
Password:

Remember Me | [Forgot password?](#)

Change Password

Change Login

- Each producer and BGA agency worker will have their own unique username and password to access SureLC.



**There are 2
'core functions'
to SureLC.**

**#1 Completing
a producer's
profile**

&

**#2 Processing
Appointment
Paperwork**

Name	Info		
	Phone	Status	Open Appointments
	(888)534-0445		
	(888)534-0445		
	(888)534-0445		
	(352)350-4040		
	(888)534-0445		
	(888)534-0445		
	(888)534-0445		
	(888)534-0445		
	(941)555-5555		
	(813)555-5555		

- The BGA worker clicks on “Add Producer” to initiate getting a new producer set up in SureLC.

Add Producer X

SSN: *

NPN
 License/State
 SSN

Last Name: *

eMail: *

Password: * 6 chars min

Branch: *

I have permission from this producer to access their

PDB Report: *

The agency worker can then add a producer based on their NPN #, any state license number, or Social Security Number.

- After these details are inputted, SureLC obtains all information on the producer from the National Insurance Producer Registry’s Producer Database®

Personal Info Questionnaire Licenses EFT&W-9 Contracting History E&O Forms Hierarchy Unrecognized

Identifications

SSN: * 91-64-5845 Gender: * Male Female Date of Birth: * 09/23/1978 eMail: * bmortongroup@gmail.com NPN:

Name

Last: * MORTON First: ROBERT Middle: BRIAN Title:

Phone: (813)977-7500 Fax: () - - Cell: (813)406-0870 Marital Status: **Divorced**

Driver Lic #: State:

Residential Address (No PO Boxes)

Line 1: * 5125 PALM SPRINGS BLVD Line 2: #12207

Zip: * 33647 City: TAMPA State: **Florida** Start Date:

Doing Business As

* Individual Business Entity Solicitor Institutional

Mailing Address

Line 1: * 5125 PALM SPRINGS BLVD Line 2: #12207

Zip: * 33647 City: TAMPA State: **Florida** Start Date:

Co

- Any information not pulled from the PDB® needs to be inputted to complete the producer's profile. This typically takes approximately 5 minutes.

Signatures and Documents Checklist

Now we need to collect some documents for the carriers and BGAs to be presented with your contracting paperwork. If you have scanner attached to your computer please scan them and drop the file(s) into the folder or please fax these documents to your BGA at the best possible quality.

Step 1. Verify documents and click Print

Document to Sign	On File	Ready for Printing	Print
Direct Deposit	No	Yes	<input checked="" type="checkbox"/>
Errors and Omissions Insurance	No	Yes	<input checked="" type="checkbox"/>
Credit Report Authorization	No	Yes	<input checked="" type="checkbox"/>
Electronic Signature Page	No	Yes	<input checked="" type="checkbox"/>

The producer **MUST** sign these 2 documents in order for to process contracting paperwork

These are optional but desired forms. Not every carrier **REQUIRES** E&O and direct deposit, so SureLC doesn't either.

Step 2. Drop Scanned PDFs in the Folder below



Once the producer signs the forms, the forms need to be turned into .pdf format. Then, these documents are 'dragged and dropped' into this folder. SureLC uses image recognition software to recognize

- **Once these documents are uploaded to the producers profile, they are completely set up, and ready to get contracted with any insurance company your agency works with.**



To Process contracting paperwork, click on the Appointment Request icon.

Appointment Request

Appointment

Back To All Producers

Edit

+ New

Current Pending at BGA Completed

Carrier	BGA	Type	States	Currently At	Since	Folder	Delete Appointment
American General Life Companies	Your Agency's Name	Contract	CT	BGA	03/29/2010	Open Local	Delete
Nationwide Life And Annuity Ins Co	Your Agency's Name	Contract	CT	BGA	03/29/2010	Open Local	Delete
West Coast Life	Your Agency's Name	Contract	OH	BGA	04/11/2010	Open Local	Delete
Aviva Life and Annuity Company	Your Agency's Name	Contract	AZ	BGA	04/22/2010	Open Local	Delete
Allianz Life In Co of North America	Your Agency's Name	Contract	AZ	BGA	04/29/2010	Open Local	Delete

The highlighted section shows previously processed contracting paperwork for the selected producer

To initiate a new set of contracting paperwork, click on New.

Appointment Request

Wait for New Business

Proceed to Carrier

Save

Revert

Carrier: Banner Life

New Business On Date: 07/27/2010

Request: Contract Add State Hierarchy Payment Termination Transfer Override

Individual Solicitor Z-Producer Sub-Producer Company Form

States

Requested States

Connecticut

Licensed Non-Appointed States

Arizona
Florida
Georgia
Hawaii
Illinois
Indiana
Kentucky

Products

Variable Life:
Variable Annuity:
Long Term Care:
Group Life and Health:
Fixed Life:
Fixed Annuity:
Health Disability:
Accident and Sickness:

Once details are selected, Proceed to Carrier button brings up the list of required/available forms.

Carrier specific questions shown here.

Document Description

Include

Minimum Transaction Amount (min \$50): 150

Commission Payment Frequency: Weekly (EFT requi)

User selects the state where an appointment is requested from the list of states where the producer has an active insurance license.

User chooses desired Product Line.

Name	Document Description	File	Reader Extended	Print	Pause	Include
BK-10	Biographical Information for Contract Applicant	BK-10.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BK-12	Agent/Agency Commission Payment Profile	BK-12.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AB-30	Agent/Broker Agreement Adoption Authorization	AB-30.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
W-9	Request for Taxpayer Identification Number and Certification	W-9.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Check	Copy of producer's voided check	directDeposit.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EnO	Copy of producer's Liability Insurance	EnO.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ABACA	Agent/Broker Advance Commission Addendum	ABACA.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ABACAAA	Advance Commission Addendum Adoption Authorization	ABACAAA.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Licenses	List of Valid State Licenses	licenses.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Explanations	Questionnaire answers explanation	explanation.pdf	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once ready, User clicks on Process to submit the selected files for the contracting bundle.

User determines where to send the completed contracting bundle.

Desired documents are selected to be included.

- At this point in time, the contracting paperwork has been processed and submitted.

If you have additional questions about the normal workflows, please contact us.

877-264-6888 (Toll Free)

813-977-7500 (Direct)

info@surancebay.com

www.surancebay.com