SureLC

Version 1.0 Beta

Producer User Guide

Revision: June 1st, 2010

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1.0 OVERVIEW

Your agency has subscribed to use SureLC, a licensing & contracting automation software. At some point in your career, you will likely need to be contracted with multiple insurance companies to sell their products. Rather then you manually filling out each insurance company's contracting paperwork whenever you need a new appointment, SureLC automates this process. You setup your profile in SureLC one time, and then whenever you need an appointment with a new insurance carrier, or you need a new non-resident appointment, SureLC automaties this process for you and your agency.

Click here to view a short video showing you the core functionality of SureLC.

2.0 GETTING STARTED

2.1 What You Need

To use SureLC, you need:

- Adobe Reader version 9.2 or higher. The most recent version can be downloaded for free at: http://get.adobe.com/reader/
- Internet Connection
- A scanner hooked up to your computer **OR** the ability to fax documents.
- SureLC software, which can be downloaded at http://www.surancebay.com/downloads/index.html

You are receiving this file because your agency has added you as a producer to SureLC. You should have already receieved an email from setup@surancebay.com, subject line of "Welcome to SuranceBay", with installation instructions and login information. If you have not received this email, check your junk/spam mail. If the email is not in your junk/spam email, contact your agency for further instructions.

2.2 Login Credentials

The agency who added you to SureLC set up your initial login and password to use SureLC, which can be found in the initial email you received from setup@surancebay.com.

2.2.1 User Name:

Your username is likely your primary email address. Your User Name is the email address you provided to the agency when they added you to SureLC. Contact your agency if your User Name is not your primary email address.

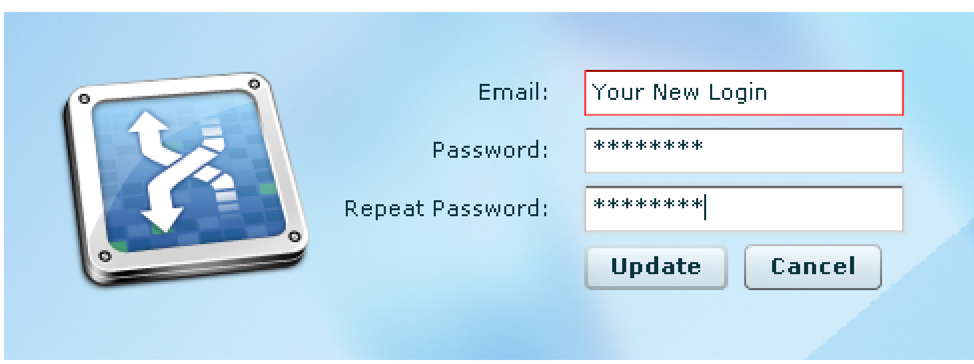
2.2.2 Password:

Your agency set up your initial password to use SureLC, which can be found in the email sent to you after your agency added you as a producer. If you do not know your password, enter your User Name and click on the Forgot password? button and you will receive an email with your initial password (check junk/spam mail for email from @surancebay.com domain).

2.3 Change User Name and/or Password

1. Enter your username
2. Enter your password
3. Select Change Password and/or Change Login, then click on Login

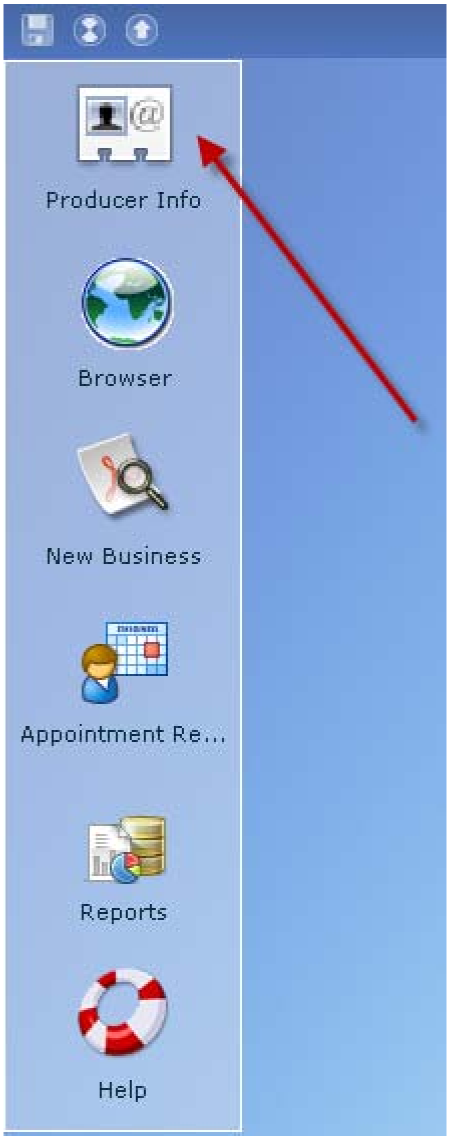
4. Enter your new username and password.



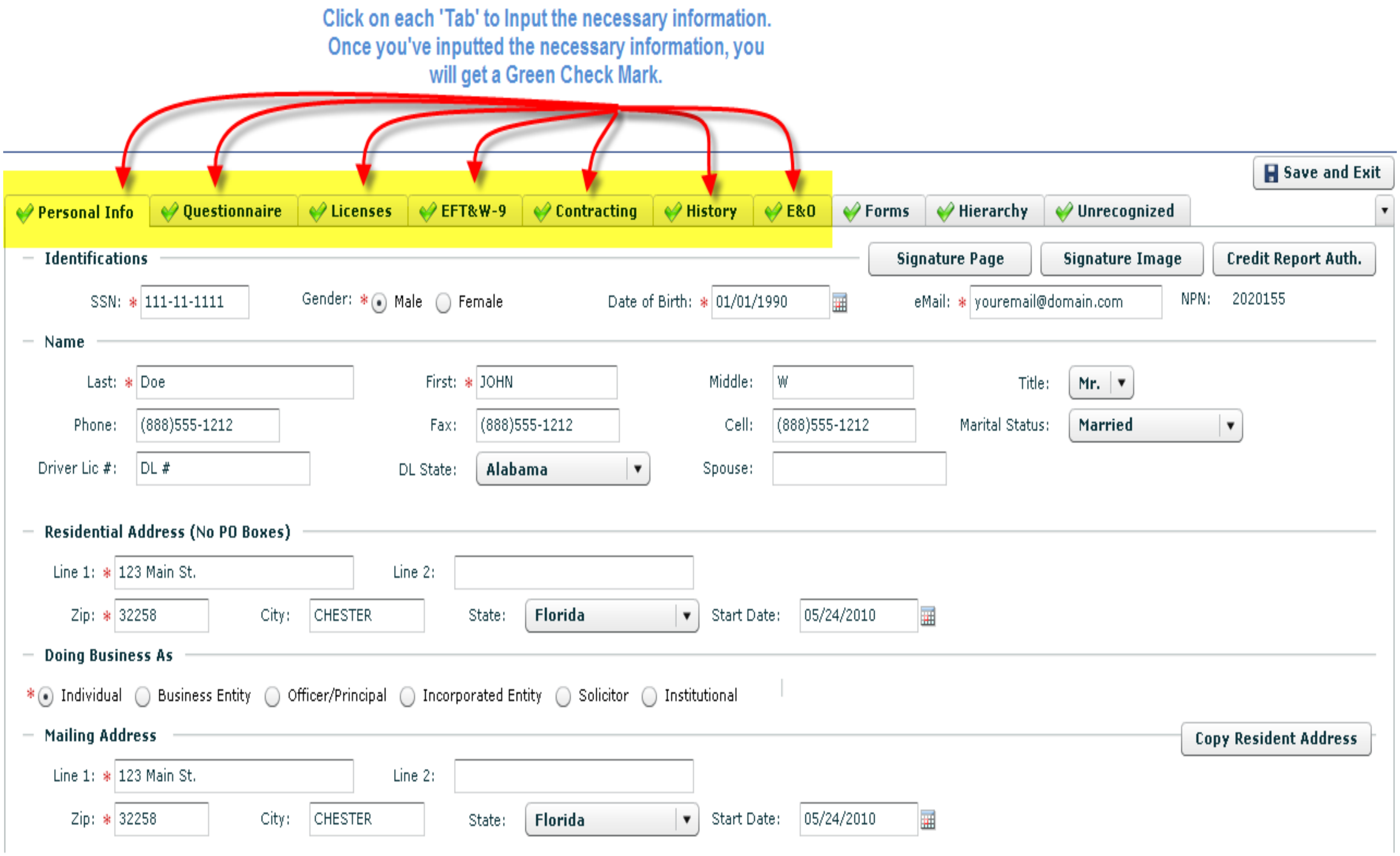
3.0 SETTING UP YOUR PROFILE

Once you set up your profile in SureLC, it will be used to populate all requested contracting paperwork.

Step 1: After logging in, click on the Producer Info icon.

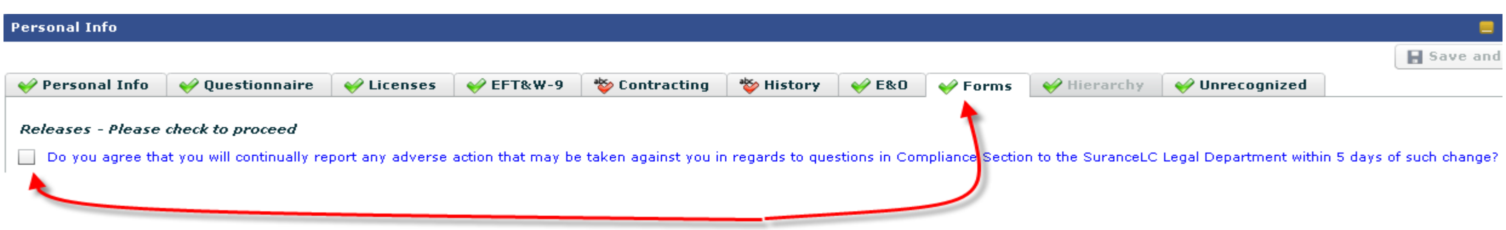


Step 2: Complete all Information under each 'Tab'

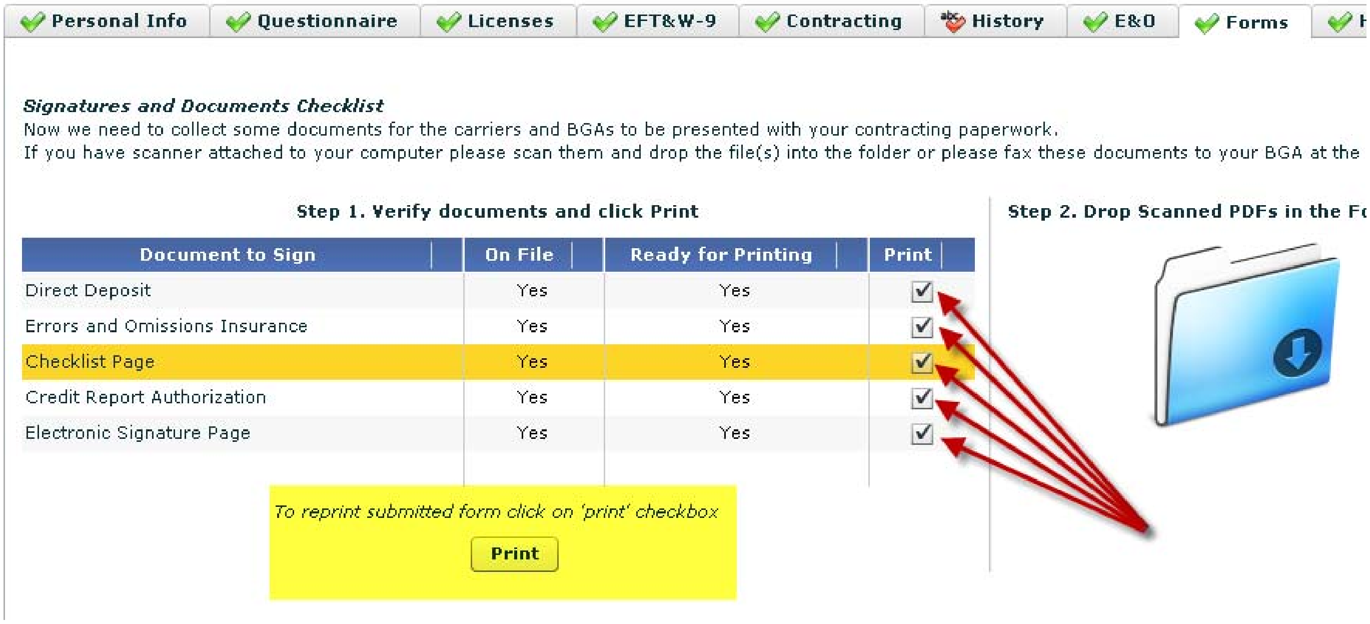


Step 3: SureLC now needs your signatures on 2 required documents. In addition, if you want commissons direct deposited to your account, you will need to provide a copy of a voided check. Finally, if you have Errors & Ommissions (E&O) insurance, SureLC needs a copy of the declaration page of your E&O insurance so it can be presented to the carriers when requested.

- Click on the Forms Tab. You must agree to update any adverse actions to SureLC within 5 days of such change.



- Select the files to print, then click Print.



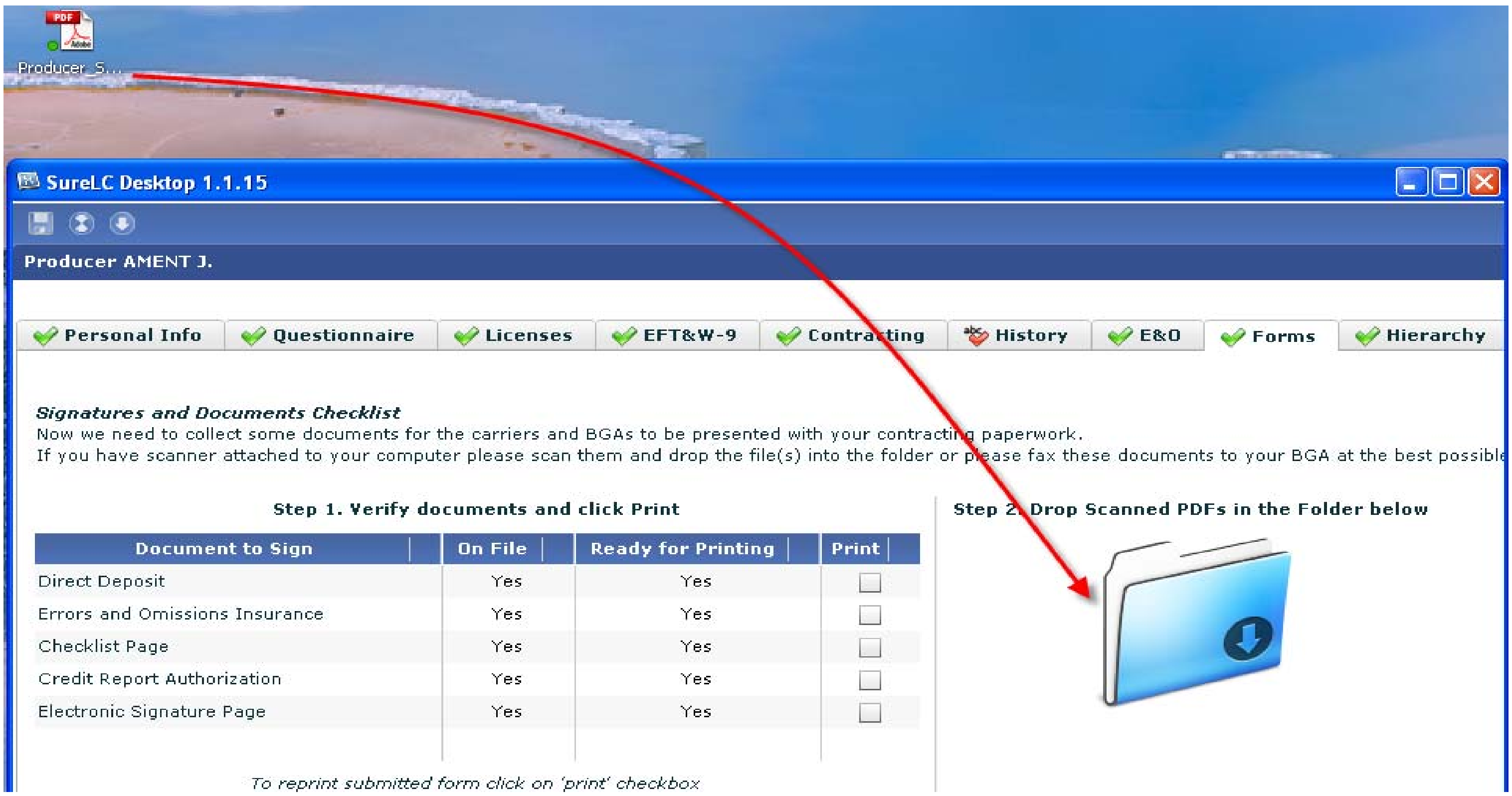
<u>Step 4</u>: Sign each required form. We recommend using a black Sharpie marker.

<u>Step 5</u>: Upload the signed documents to your profile.

- If you have a scanner hooked up to your computer, scan the required documents, then drop them into the folder.

- If you do NOT have a scanner hooked up to your computer, fax the documents to your agency, and they will drop the files into your profile.

__NOTE__ → The **<u>Electronic Signature Page</u>** and **<u>Credit Report Authorization Page</u>** are required documents that you must sign and have uploaded to SureLC. Failure to sign and upload these documents to your profile will inhibit your agency from producing your contracting paperwork. If you decide not to sign these documents, contact your agency so they can send you the carrier's contracting paperwork for you to manually complete.


Producer_S...
SureLC Desktop 1.1.15
Producer AMENT J.
Personal Info
Questionnaire
Licenses
EFT&W-9
Contracting
History
E&O
Forms
Hierarchy
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
Step 1. Verify documents and click Print
Step 2. Drop Scanned PDFs in the Folder below
Document to Sign
On File
Ready for Printing
Print
Direct Deposit
Yes
Yes
Errors and Omissions Insurance
Yes
Yes
Checklist Page
Yes
Yes
Credit Report Authorization
Yes
Yes
Electronic Signature Page
Yes
Yes
To reprint submitted form click on 'print' checkbox

4.0 REQUESTING A CARRIER APPOINTMENT

After your profile has been set up in SureLC, you can request your agency to submit contracting paperwork with any carrier.

4.1 Appointment Request Outside of SureLC

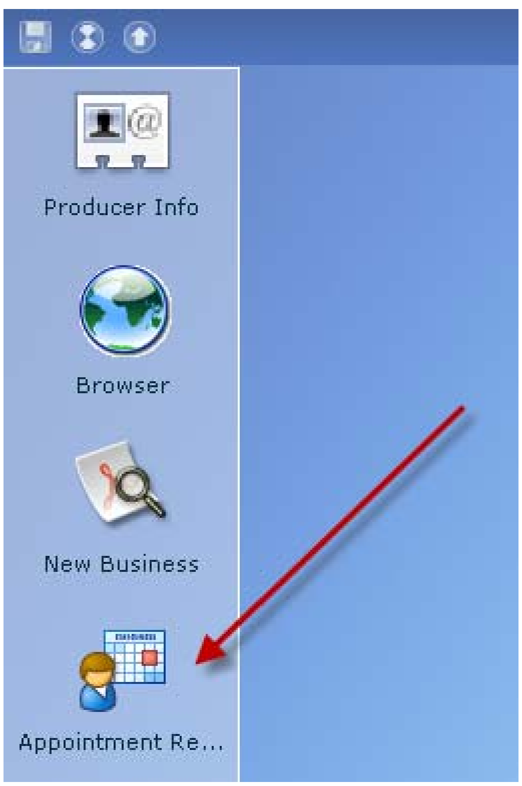
If you prefer not to use SureLC to ask your agency to submit contracting paperwork for a desired carrier, you can:

- Send your agency an email
- Call your agency
- Fax a request to your agency
- Submit new business to your agency, which will prompt them to process appointment paperwork if you are not contracted with the carrier (non pre-appointment states only).

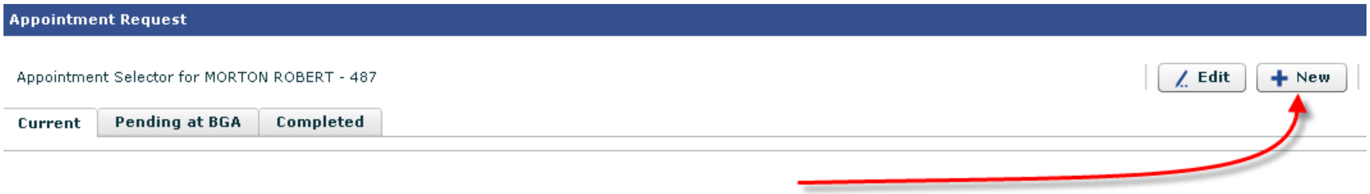
4.2 Request Appointments through SureLC

You can submit a request to your agency for an appointment through SureLC. Follow these instructions:

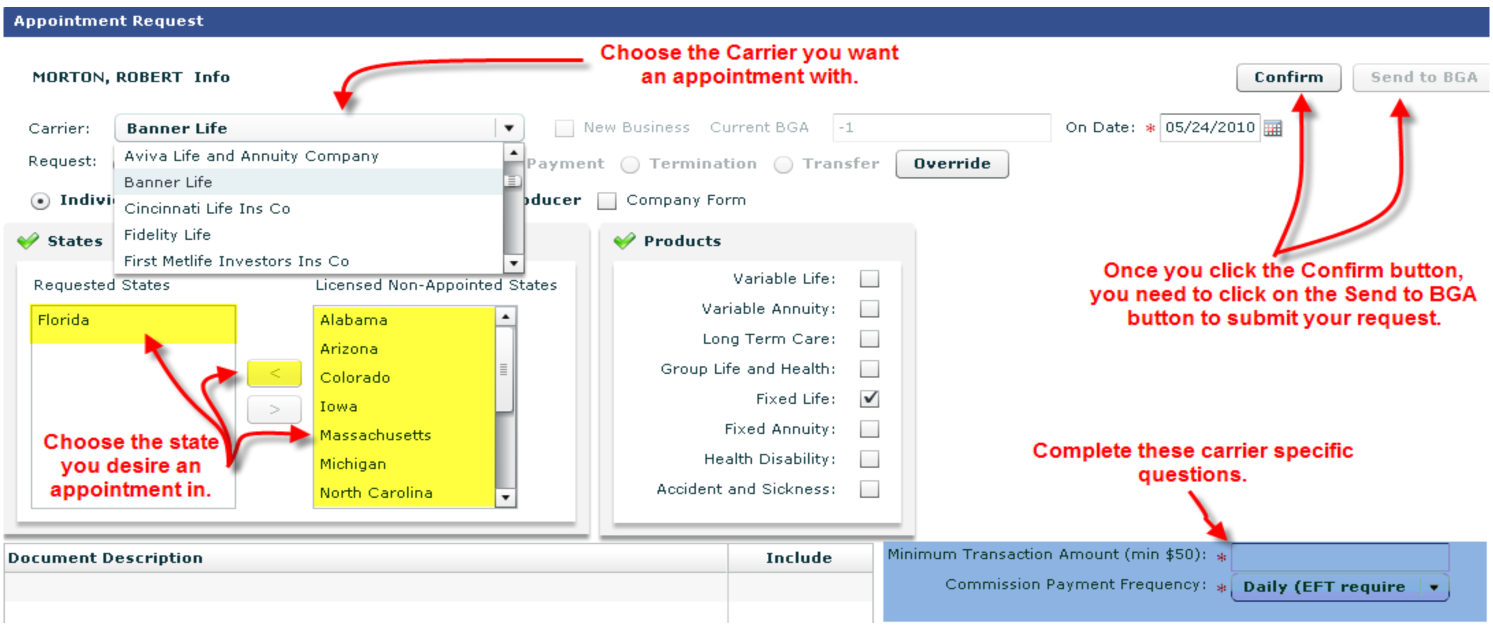
Step 1: Click on Appointmnet Request



<u>Step 2</u>: Click on the New button:



<u>Step 3</u>: Make your selections. Click Confirm. Then click on Send to BGA, your request will be submitted to your agency.



Some carriers require you to initiate your request for an appointment directly through SureLC, while others do not.

If a carrier requires you to initiate a contract request through SureLC, you will need to view the auto-completed contracting paperwork, Confirm it is accurate, prior to submitting the request to your BGA. If you are not satisfied with how the contracting paperwork has been completed, you will need to adjust your profile in SureLC prior to submitting the request to your BGA.

Contact your agency with any questions you may have or more details.

5.0 TROUBLESHOOTING AND FREQUENTLY ASKED QUESTIONS

5.1 Producer Training Video

Click here for a full length demo for how to set up your profile and submit appointment requests.

5.2 Printing Problem

SureLC requires that you have Adobe Reader version 9.2 or higher. Click here to install the most recent version of Adobe Reader.

Click here to view a video tutorial showing you how to install the most recent version of Adobe Reader.

5.3 Viewing SureLC

To best view SureLC, set your monitor's resolution to 1280 x 800. Click here to view a video tutorial showing you how to make the adjustment.

If you have any additional problems and/or questions, contact your agency for support.