



ATP Producer

Getting Started Guide

Annuities Training Platform Getting Started Guide for Producers

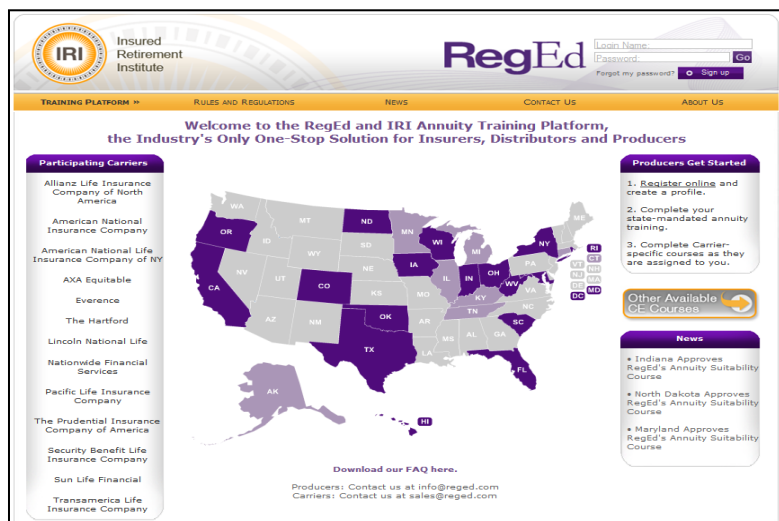
As the leading industry platform with several large carriers, RegEd's Annuity Training Platform is the solution for reducing this training burden and keeping producers focused on selling. The platform:

- ... Provides the ability for producers to meet multiple carrier requirements on one platform. RegEd's Annuity Training Platform makes it easy for producers to register and take the necessary state suitability and carrier-specific product training courses.
- ... Is the one place where distributors can see an agent's complete compliance profile for annuities training. This includes both the state suitability requirements and carrier-specific product training.
- ... Ensures producer compliance with the state suitability requirements for the states in which they sell annuities. The platform has an extensive rule base to determine reciprocity rules and initial and ongoing training requirements.
- ... Already has several of the leading carriers and their producer populations participating on the platform.

Here is how producers can get started:

Producer Registration

- 1) Go to <https://secure.reged.com/TrainingPlatform/>.
- 2) Select **"Sign Up"** in the top right hand corner.



3) Complete the registration form.

RegEd

Create Profile > Payment Information > License Information

Annuities Training Platform Sign Up

Login Information

The security questions / answers are required to help you reset your password, if you forget your password.

*Login Email: Will be used as Login Name and Contact Email

*Password: (Passwords must be at least 8 characters, and contain at least 2 alphabetic characters and 2 numbers)

*Verify Password:

*Security Question 1: *Answer:

*Security Question 2: *Answer:

*Security Question 3: *Answer:

(You must select 3 different questions and provide 3 different answers which do not match your password.)

Identifying Information

We require your Social Security Number and Date of Birth to process your CE as per state requirements.

Prefix:

*First Name: *Last Name: MI: Sfx:

*Social Security #: - -

*Verify Social Security #: - -

*Date of Birth: / /

*National Producer Number (NPN): Find NPN

Business Address

*Address Line 1:

Address Line 2:

*City: *State: *Zip:

*Phone: Ext:

Fax:

Shipping Information

We require your shipping address to send you your certificates as per state requirements.

☒ Same as Business Address ☐ I want to enter different Shipping Information

Terms of Service

☐ I accept the [Terms of Service](#) and site usage requirements

* Denotes required field

4) Indicate the state(s) where you sell or will be selling an annuity product and supply the required information.

RegEd

Annuities State Suitability Product Training

Manage Annuities Product Training Requirements

Please indicate the state(s) where you sell or plan to sell annuity products:

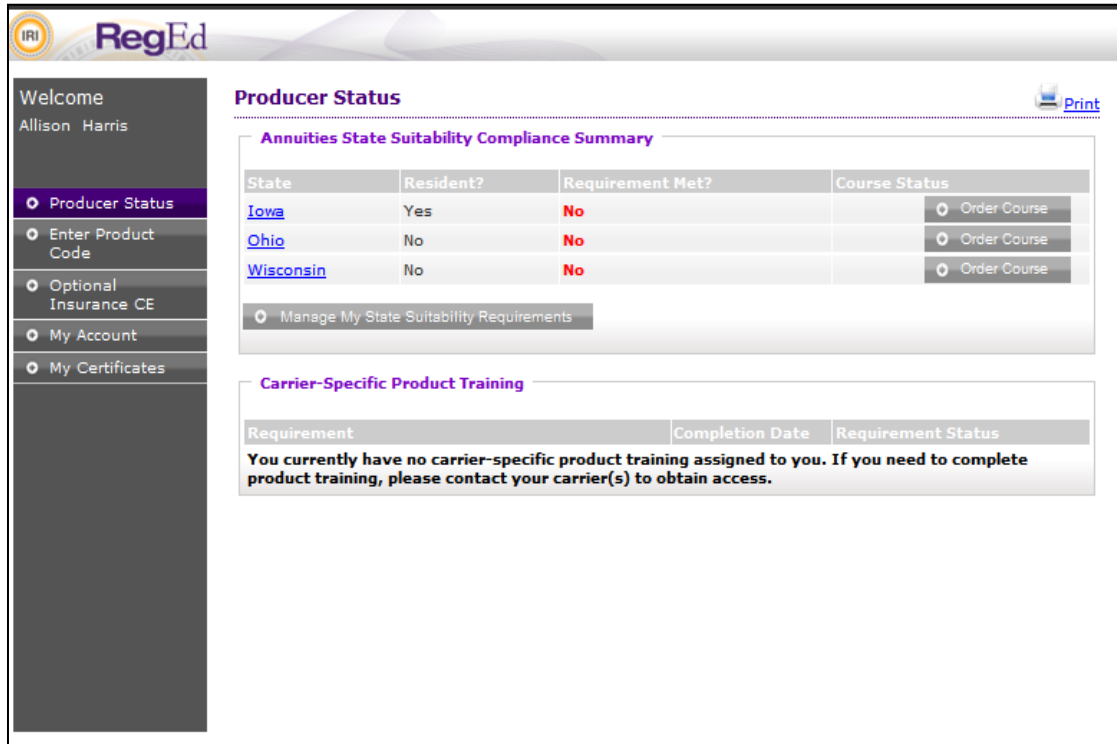
Delete?	State	Resident?
X	Select a State	<input type="checkbox"/>

Add a New State

Save

Producer Status: State Suitability Training

- 1) In order to access your state suitability training (i.e. the 4-hour state requirement, select “**Order Course**”.

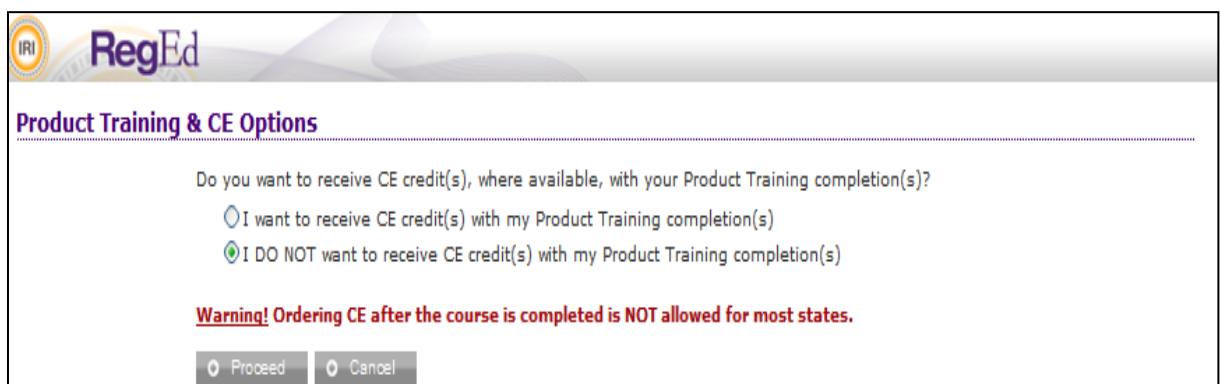


The screenshot shows the RegEd website interface. On the left is a navigation menu with options: Welcome Allison Harris, Producer Status (selected), Enter Product Code, Optional Insurance CE, My Account, and My Certificates. The main content area is titled 'Producer Status' and includes a 'Print' button. Below this is a section for 'Annuities State Suitability Compliance Summary' which contains a table with columns: State, Resident?, Requirement Met?, and Course Status. The table lists Iowa, Ohio, and Wisconsin, all with 'No' for Requirement Met and an 'Order Course' button. Below the table is a 'Manage My State Suitability Requirements' button. Another section, 'Carrier-Specific Product Training', shows a table with columns: Requirement, Completion Date, and Requirement Status. A message states: 'You currently have no carrier-specific product training assigned to you. If you need to complete product training, please contact your carrier(s) to obtain access.'

State	Resident?	Requirement Met?	Course Status
Iowa	Yes	No	<input type="button" value="Order Course"/>
Ohio	No	No	<input type="button" value="Order Course"/>
Wisconsin	No	No	<input type="button" value="Order Course"/>

Requirement	Completion Date	Requirement Status
You currently have no carrier-specific product training assigned to you. If you need to complete product training, please contact your carrier(s) to obtain access.		

- 2) Indicate whether you would like to complete your state suitability training course **with or without** Continuing Education (CE) credit. NOTE: many states *do not* allow post-ordering of CE credit once a course has been completed.



The screenshot shows the 'Product Training & CE Options' section of the RegEd website. It asks the user: 'Do you want to receive CE credit(s), where available, with your Product Training completion(s)?'. There are two radio button options: 'I want to receive CE credit(s) with my Product Training completion(s)' and 'I DO NOT want to receive CE credit(s) with my Product Training completion(s)'. Below these is a red warning message: 'Warning! Ordering CE after the course is completed is NOT allowed for most states.' At the bottom are 'Proceed' and 'Cancel' buttons.

Do you want to receive CE credit(s), where available, with your Product Training completion(s)?

☐ I want to receive CE credit(s) with my Product Training completion(s)

☒ I DO NOT want to receive CE credit(s) with my Product Training completion(s)

Warning! Ordering CE after the course is completed is NOT allowed for most states.

- 3) Select the course(s) and/or CE credit you wish to order and complete your order. To view which courses are reciprocal (i.e. these courses have been approved in the states listed by the participating carriers on the ATP platform) select the **hyperlink** next to “Annuities State Suitability Approved In:” section.

Available Courses and CE Credit

To receive credit you must select **Add** for the credits desired. If no credits appear, the courses you have completed or ordered are not approved for that state or professional designation. To review your completed order, select **Proceed**.

Search Titles Within List

Add Course	Credits	Course Rating	Price
<input type="checkbox"/> NAIC Suitability in Annuity Transactions Model Regulation (390) Annuities State Suitability Approved In: IA, OH, WI <input type="checkbox"/> CE Credit for Ohio Ohio State Fee	4 Annuity	- Advanced	\$0.00
<input type="checkbox"/> Suitability of Annuity Transactions as Required by the State Annuities State Suitability Approved In: IA, OH, WI <input type="checkbox"/> CE Credit for Iowa Iowa State Fee	4 Annuity Products	- Advanced	\$15.00
<input type="checkbox"/> Suitability of Annuity Transactions as Required by the State Annuities State Suitability Approved In: IA, OH, WI <input type="checkbox"/> CE Credit for Wisconsin* This course must be ordered	4 Annuity Suitability	- Advanced	\$15.00

Tooltip: This course is approved in the following state(s) for the reflected amount of annuities state and suitability training hours:

State	Credits
IA	4.00
OH	4.00
WI	4.00

- 4) Once your order has been completed, select “**Go To Course**” to access the training.

Welcome
Allison Harris

Producer Status

Annuities State Suitability Compliance Summary

State	Resident?	Requirement Met?	Course Status
Iowa	Yes	No	<input type="button" value="Go to Course"/>
Ohio	No	No	<input type="button" value="Go to Course"/>
Wisconsin	No	No	<input type="button" value="Go to Course"/>

Carrier-Specific Product Training

Requirement	Completion Date	Requirement Status
You currently have no carrier-specific product training assigned to you. If you need to complete product training, please contact your carrier(s) to obtain access.		

- 5) To update your product training requirements (i.e. add/remove states) select **Manage My State Suitability Requirements**.

Producer Status: Carrier-Specific Product Training

- 1) To access carrier-specific product training that has been assigned to you select **“Go To Requirement”** for the applicable training listed on Producer Status. NOTE: if you *do not* see a carrier’s product training assigned to you, please contact your carrier(s) in order to obtain access to the training(s).

The screenshot displays the RegEd web application interface. On the left is a navigation menu with options: Welcome Allison Harris, Producer Status (selected), Enter Product Code, Optional Insurance CE, My Account, My Certificates, and Carrier 1 Product Training. The main content area is titled 'Producer Status' and includes a 'Print' button. It is divided into two sections: 'Annuities State Suitability Compliance Summary' and 'Carrier-Specific Product Training'.

Annuities State Suitability Compliance Summary

State	Resident?	Requirement Met?	Course Status
Iowa	Yes	No	Go to Course
Ohio	No	No	Go to Course
Wisconsin	No	No	Go to Course

[Manage My State Suitability Requirements](#)

Carrier-Specific Product Training

Requirement	Completion Date	Requirement Status
CARRIER 1 PRODUCT TRAINING		
2010 Annual Compliance Meeting (ANN_ACM)		Go To Requirement

- 2) To access carrier-specific product training **records of completion** select the training module from the left-hand navigation menu and select the **Course History** option in **My Courses**.

The screenshot shows the 'My Courses' page in the RegEd system. The 'Course History' tab is selected. The page contains several informational paragraphs and a table with columns: Course Name, Course Status, Course Completion Date, Print Record / E-Cert, and Course Library. The table is currently empty.

My Courses

Active Courses **Course History**

You have completed the courses listed below. To print a record of successful completion, select the corresponding **Print Record** button. **Note:** The record of successful completion is not a state insurance, professional designation or product training certificate of completion.

You now have access to the study guide material after you have completed your online exam. When you select the **View Study Guide** button below, you will have access to a PDF of the study material for each course.

You may also order insurance or professional designation credit for courses you have already completed. If you would like to order insurance credit for any completed course listed below, please select the **Order Additional Insurance Credit** button.

To view/print the E-Cert for State CE Credits that have an E-Cert available, click the **View E-Cert** button to be taken to the E-Certs page.

Course Name	Course Status	Course Completion Date	Print Record / E-Cert	Course Library
State or Professional Designation CE Status				

Enter Product Code

- 1) If you have a product training code provided by your carrier, select “**Enter Product Code**” via the left-hand navigation menu and enter the product code provided. Once your product code has been supplied you will be able to access it via Producer Status.

The screenshot shows the 'Just-In-Time Product Training' page. On the left is a navigation menu with options: Welcome Allison Harris, Producer Status, Enter Product Code (selected), Optional Insurance CE, My Account, My Certificates, and Carrier 1 Product Training. The main content area prompts the user to supply a Product Code and includes a text box for the code and a Submit button.

Just-In-Time Product Training

Please supply the Product Code provided by your carrier below.

After you supply the Product Code your assigned carrier-specific requirement(s) will appear on your Producer Status page to complete. If you do not complete the assigned carrier-specific requirement(s), you may come back and re-enter the Product Code provided at any time to access the requirement(s) again.

Your carrier will be notified of the status of your completion(s).

***Product Code:**

Optional Insurance CE

- 1) To view the Optional Insurance CE courses select “**Optional Insurance CE**” via the left-hand navigation menu.

- 2) Select **“Proceed”** to complete additional courses available to you at a discounted rate.

Optional Insurance CE

RegEd's course library with more than 300 approved insurance courses is available to all participating producers at discounted rates. Courses are only \$6.00 and include a state certificate of completion. Course topics include:

- Ethics
- Long Term Care
- Life & Health
- Property & Casualty
- Adjuster
- Professional Designations
- ...and many more!

To access RegEd's vast library of training to meet your continuing education needs please select the Proceed button below.

If you have any questions, please contact RegEd Customer Support at 800.334.6322
Monday through Friday, 8 am to 8 pm Eastern

[Proceed](#)

My Certificates

- 1) To view CE certificates of completion that have been issued to you select **“My Certificates”**.

My Certificates

A paper certificate will be mailed to you. [Print certificate](#) [Request a paper certificate](#)

Please ensure your pop-up blocker is disabled when downloading your certificate.

[Download My Transcript](#)

Page 1

Provider	License Type	State (Course #)	Course Name (Course ID)	Completion Date	Status	Certificate	Print Rules
You currently have no certificates to view or print.							

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