e123 Resource Guide

Agent Registration Guide

Version: e123_Documentation_Agent_Registration_v1_20240515

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Overview

The e123 system allows for your organization to successfully and effectively set-up an Agent Hierarchy in the platform.

For purposes of this training, the label “Agent” is used. This term can be used interchangeably with your organization’s naming convention be it Broker, Distributor, Sales Representative, or Producer.

This is a generic guide to help Agents understand the scope of what to expect during registration. Each organization and/or Program Management company may have more or less information than seen in this guide. Because of this, please be mindful of all requirements for the program you are representing.

Objective

The objective of this guide is to provide you with the instructions necessary to register as an Agent and effectively confirm your profile was created.

This guide will begin with how to register, what to expect, and then provide answers to a few frequently asked questions.

NOTE: This is a generic guide to help Agents understand the scope of what to expect during registration. This Resource Guide contains samples and some of it may not apply to your organization’s process flow.

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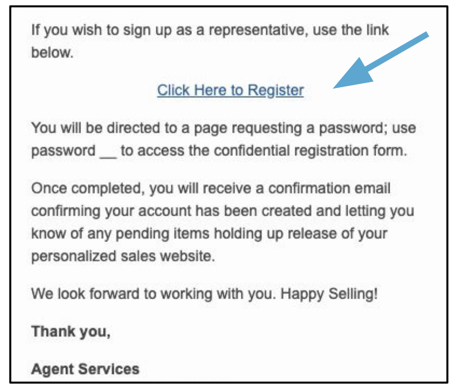
Agent Online Registration

Agents are able to register online to obtain their own sales website to enroll members into their products and programs.

Beginning Registration

1) An agent will receive a link and a password from their Upline to use to register.



2) Click the “Agent Signup” link on the sales website.

3) Enter the provided password, and click “Submit” to get to the registration page.

When Enrolling:
Agents should be prepared to enter their demographic data, and, if required by the program, upload their E&O and license(s), and fill out other required paperwork.

Agent Online Registration - continued

Enter Your Demographics

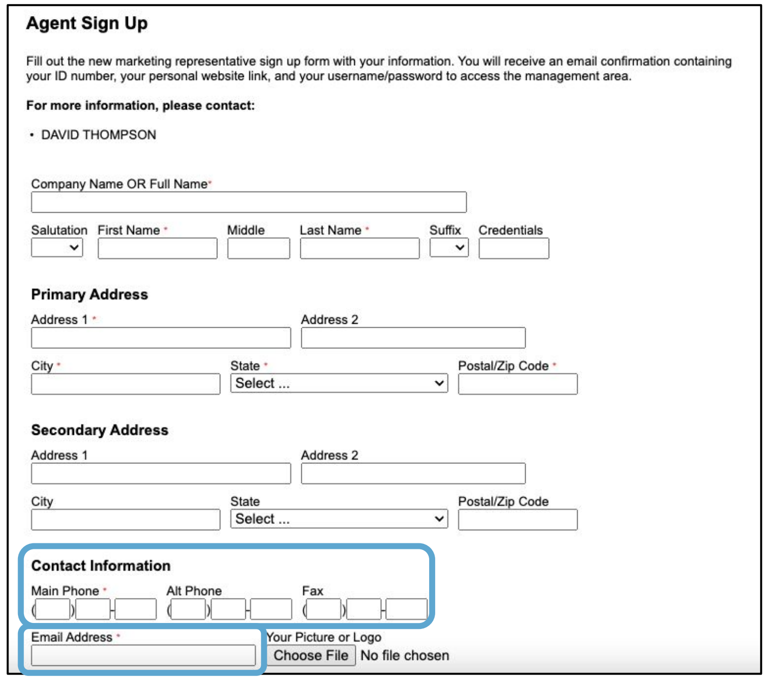
4) An agent will need to enter:

- Business name
- Name
- Home and business addresses
- Phone number(s)
- Email address

Note: The phone number(s) and email address entered may be used to contact your office by CSRs and members. The email entered is where potential communications from the system will be sent to.

5) Continue entering:

- Demographics
- A chosen back office login
- ID Numbers:
  - Tax or SSN
  - NPN
- If required, bank account information



Agent Sign Up

Fill out the new marketing representative sign up form with your information. You will receive an email confirmation containing your ID number, your personal website link, and your username/password to access the management area.

For more information, please contact:

- DAVID THOMPSON

Company Name OR Full Name*

Salutation | First Name * | Middle | Last Name * | Suffix | Credentials

Primary Address

Address 1 * | Address 2

City * | State * Select ... | Postal/Zip Code *

Secondary Address

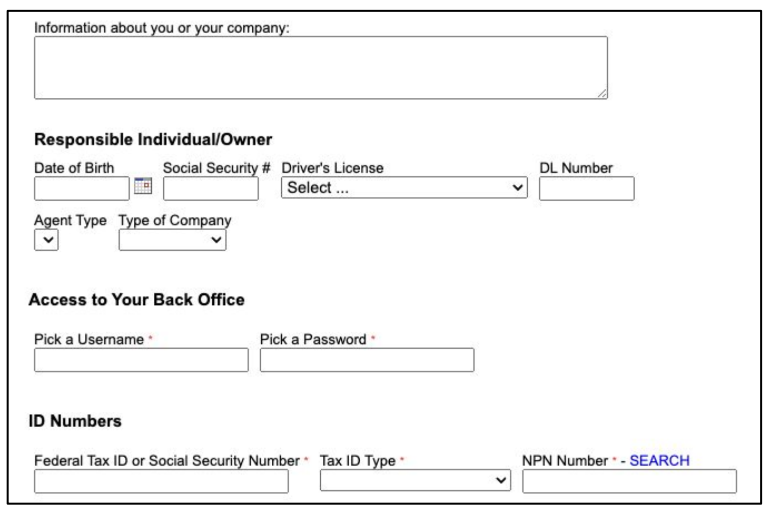
Address 1 | Address 2

City | State Select ... | Postal/Zip Code

Contact Information

Main Phone * | Alt Phone | Fax

Email Address * | Your Picture or Logo Choose File No file chosen



Information about you or your company:

Responsible Individual/Owner

Date of Birth | Social Security # | Driver's License Select ... | DL Number

Agent Type | Type of Company

Access to Your Back Office

Pick a Username * | Pick a Password *

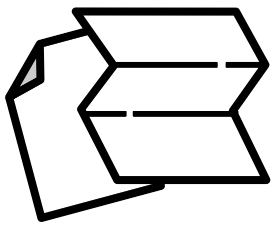
ID Numbers

Federal Tax ID or Social Security Number * | Tax ID Type * | NPN Number * - SEARCH

Bank Account Information for Commission Payments

Account Type: Checking / Savings | Bank Routing Number | Bank Account Number

Agent Online Registration - Paperwork (If Required)



Potential Paperwork to Expect

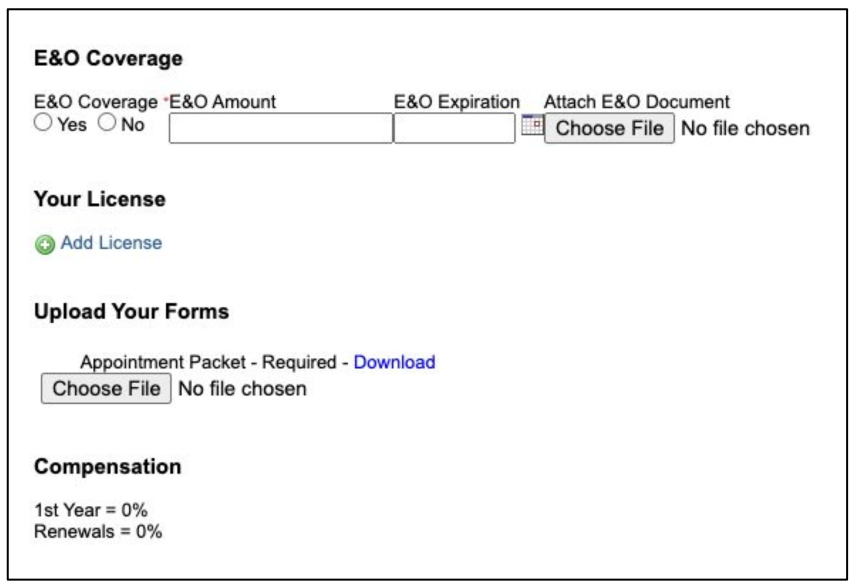
6) Depending on an organization's and program's requirements, you may need to upload documents during registration.

- Errors and Omissions Documentation
- Your home and all non-resident licenses.

You may need to download and complete:

- An Appointment Package
- A W-9 Form
- An Agent Sales Agreement

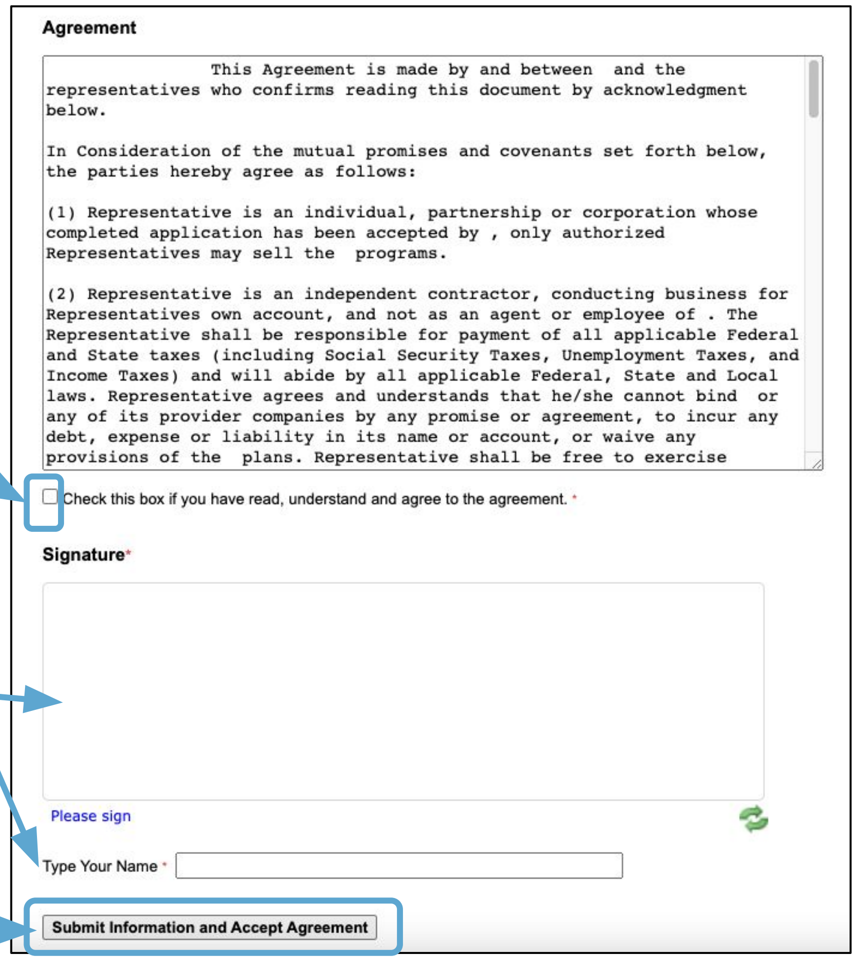
You may see the compensation level as it relates to your program's sign-up.



IMPORTANT**:** *Be sure to fill out all information and signatures. Upload your documents during registration to save to your profile. If you do not finish inputting your information or you do not sign your paperwork, it could cause delays with your ability to sell with your organization.*

Agent Online Registration - Agreement

Agent Agreement: Rules and regulations as outlined by the Enrollment System, Program Administrators, and/or Carrier(s)



7) Read the agent agreement carefully. This is a contract you will be held to.

Check the box below it confirming your understanding and agreement.

8) Sign and type your name. This will be your electronic signature.

9) Then, hit submit!

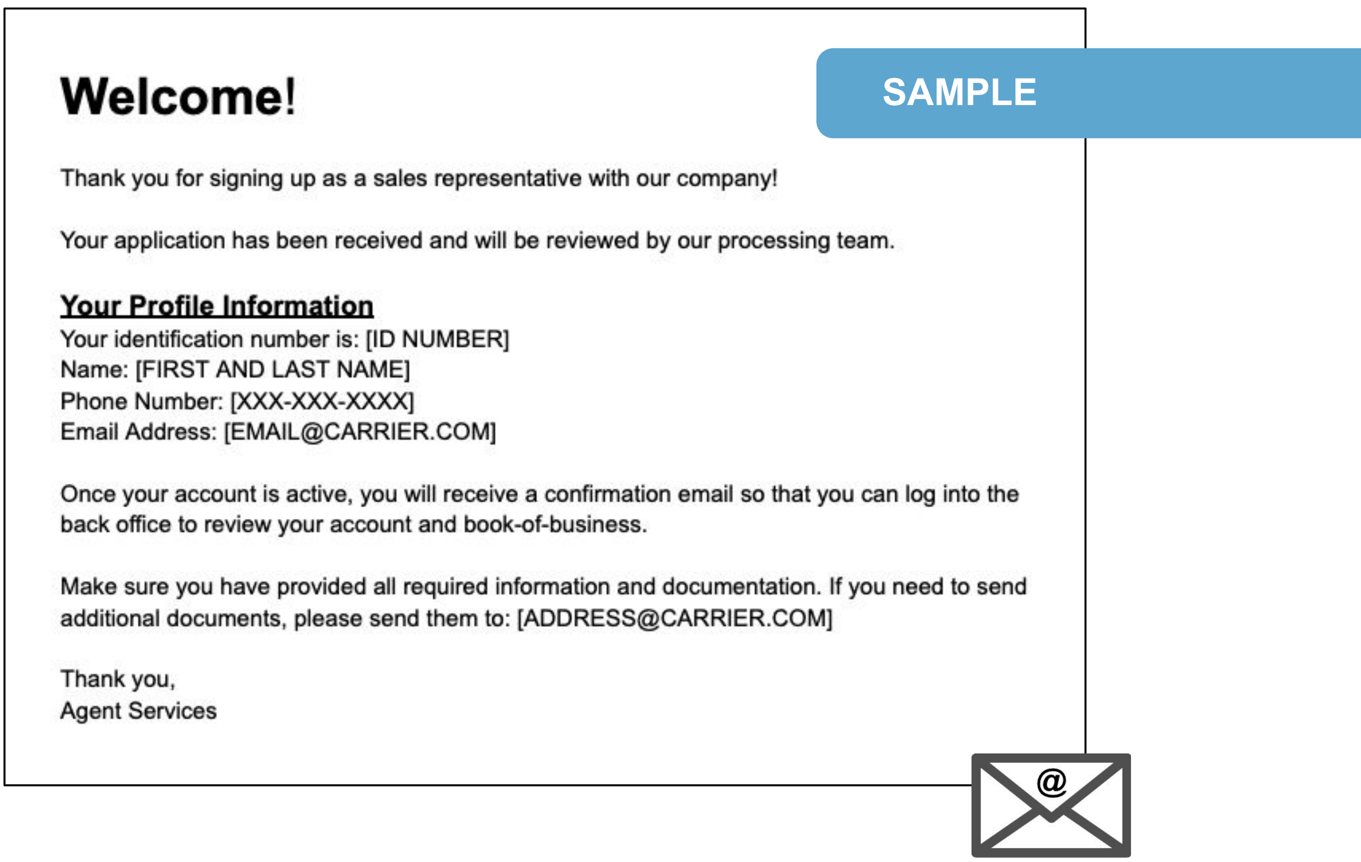
10) Once you submit your registration, the system will automatically create a profile with your information and save all of the documents you uploaded to it. All data and paperwork will be reviewed by the program's designated Agent Management/Services team to confirm completion.

Confirmation of Submission

Contracting Confirmation to the Agent

Depending on the program, once an agent has successfully enrolled, they may receive a Contracting Confirmation Letter/Email.

The Letter normally contains all necessary documentation and instructions on how to be released for sales, and if applicable, become appointed for sales.



Welcome!

Thank you for signing up as a sales representative with our company!

Your application has been received and will be reviewed by our processing team.

Your Profile Information
Your identification number is: [ID NUMBER]
Name: [FIRST AND LAST NAME]
Phone Number: [XXX-XXX-XXXX]
Email Address: [EMAIL@CARRIER.COM]

Once your account is active, you will receive a confirmation email so that you can log into the back office to review your account and book-of-business.

Make sure you have provided all required information and documentation. If you need to send additional documents, please send them to: [ADDRESS@CARRIER.COM]

Thank you,
Agent Services

Welcome/Release Letter

Welcome/Release Letter to the Agent

Again, depending on the program, when an Agent is reviewed and approved, a Welcome Letter/Email may be sent.

It typically contains instructions on how to sell, login to the back office, and educational information.

SAMPLE

Congratulations!

You have completed all of your required paperwork. Your sales account with our company is released.

You may begin submitting applications.

Your Profile Information
Your identification number is: [ID NUMBER]
Name: [FIRST AND LAST NAME]
Phone Number: [XXX-XXX-XXXX]
Email Address: [EMAIL@CARRIER.COM]

Attached you will find company approved marketing materials. Please let our team know if you have any questions.

You should contact your upline for questions about commissions.

Thank you for your interest in selling with us,
Agent Services

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Frequently Asked Questions (FAQs)

How do I know my information is safe?

The enrollment platform is heavily guarded against hacking and malware. Only Users that have been trained in compliance guidelines and vetted by the Program Manager are able to access the back office information.

As an additional layer of security, searching Agent banking information is not an available option. Only Users who are delegated by the Program Manager with specific accounting credentials can access banking information.

Why do I have to enter all this information while registering?

It is up to your organization to determine how much data will be collected when an Agent is added into the platform. Often, some carriers require certain Agent data, such as a National Producer Number (NPN), to be included on eligibility or appointment files.

You may be asked if you will we be setting up trees based on Agencies, Call Centers, or Groups. If you have Group business, will the Groups have a headquarters and multiple locations/branches that require different trees?

Can another Agent see my book-of-business?

An Agent can only see the book-of-business they have written unless they are a Parent. If they are a Parent (such as an FMO or Agency) over an Agent, they will see their own book-of-business and the books-of-business of the Agents signed up under them. Agents will not see anyone not under their tree.

How do I get training?

Product training should be completed with the upline/Program Management team.

Completed Training

This is the end of the training manual.

If you have any additional questions, please reach out to your upline for support.

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