ONBOARDING STEPS

Welcome to the team! We're excited to help you get started. The sooner we get you onboarded, the sooner you can get selling!
Follow each step in detail to ensure a smooth and efficient onboarding process!

STEP 1 - GET LICENSED

First and foremost, we need to get you licensed with your resident state. This is the longest and most tedious step of the onboarding process, so be sure to follow steps carefully and in order.

1. **Schedule your State Producer License Exam using the link below -**

    a. State Prelicensing
    b. Screenshot your exam date confirmation page. You'll need this when requesting your study materials for the exam.

2. **Request for Study Materials**

    a. Create a new email specifically for your life insurance business. Most people keep it simple and clean. Ex: *insuredby(firstname)@gmail.com*
    b. Use the Study Material Request Link to request your study course. You should receive an email from our admin with your course credentials within 24 hours.

    This is your main focus for now! Don't worry about the next onboarding steps until after you've passed your exam! Get studying!

3. **Pass Exam and Apply for License**

    Congrats on passing! Follow the below steps to finish applying for your license.

    a. Refer back to the State Prelicensing page for state specific requirements. Most states will require **fingerprints** from specific providers. Use the provided links from your state's page to schedule and complete fingerprints.
    b. Be sure to double check if your state requires anything additional beyond fingerprints!
    c. **After** completing fingerprints, use the NIPR site to apply for your **Resident License**. This is your initial license needed to get contracted and sell. You have the ability to purchase more state licenses later!
    d. Be on the lookout for emails from NIPR stating your license has been **Approved!** Expect this to take a couple days. Use the below links to check for updates -
    e. Application Status Lookup - see updates for specific transactions or applications using a payment or order number.

f. [NPN Lookup] - see if you have received your National Producer Number. If you have an assigned NPN, this means your license is approved! **THIS NUMBER IS VERY IMPORTANT, WRITE IT DOWN AND/OR KEEP IT IN YOUR NOTES.**

4. **Join Team Channels**

    a. If you have not already joined, message your direct manager to grant access to the team discord channels. Updates, announcements, sales, etc. are posted here daily. Stay in the loop!

DO NOT PROCEED to the next step **UNTIL** your license is **APPROVED** and you have received your NPN.

STEP 2 - GET CONTRACTED

Congrats on getting licensed! The next step is getting you contracted with our carriers. As brokers, we partner directly with top carriers to offer our clients the best options. Follow along carefully to ensure a smooth contracting experience and avoid delays in approvals.

1. **Submit your request for contracting to our admin by using link below -**

    a. New Agent Profile
    b. Be on the lookout for an **Onboarding Instructions** email from our admin within 24 hours. Begin the next steps while waiting for it to come in.

2. **Make an Insurance Credentials folder in your Notes.**

    a. We recommend doing this in your notes app, especially if you have a mac/iphone, as they will sync on both devices. Make sure you have quick and easy access to this folder. This is where you will keep your **Agent Numbers** and **Carrier Login** information as they come in.

WATCH THIS before starting the next step:
What is Gateway, HCMS, SureLC, NLC?

3. **Follow Onboarding Instructions in Email for Carrier Contracting**

    a. At this point, you should have the **Onboarding Instructions** email from our admin. Follow the instructions closely and in order, as there are specific links and forms to fill out. Doing this out of order can result in a delay of contract approvals.
    b. Fill out all forms needed for your **HCMS, Gateway, SureLC, and NLC**.
    c. Finish requesting for the carrier contracts that are listed in the instruction email.

d. **VERY IMPORTANT** to reply back to our admin once you've completed all the steps. This allows them to send more onboarding emails with additional carriers.

4. Receive Carrier Logins and Credentials

a. Now that you've submitted requests to all the carriers, be expecting emails directly from them with your contract approvals and details.

***JUMP TO STEP 3 - While waiting for carrier approvals, watch the Bootcamp Training Videos. Return here and continue as your carrier emails arrive.**

b. What to do when each carrier email arrives - **VERY IMPORTANT**
   i. Save your **Agent/Writer Numbers** in your **Insurance Credentials** notes you created earlier. You will need these numbers for some applications, and all backend work for already sold policies.
   ii. **Login/Registe**r for each carrier's portal. Each process will vary slightly, so pay attention to the specific instructions! **BOOKMARK** these portals for easy access later! **SAVE USERNAMES & PASSWORDS** in your notes!
   iii. Use the Polaris Agency site to test each EAPP and QUOTE tool, ensuring you can login without issues. Trust us, you do not want to be on the phone with a client fumbling around trying to log in.

STEP 3 - BOOTCAMP & TRAINING

You've successfully submitted for your carrier contract approvals! Almost there! While we wait for those to be approved, follow the steps below to begin your training. This will help you get a better grasp on the industry as a whole, along with products, scripts, and overall sales techniques and psychology.

1. Watch Bootcamp Training Videos

a. You can access the Bootcamp using this link - NEW AGENT BOOTCAMP - or through the #bootcamp channel in discord.
b. Create an account and watch **ALL** videos. Take notes and write down any further questions you have. After completing the course, touch base with your manager to answer any additional questions.

2. Join F90 Training - In House Sales Trainer

a. You can access the F90 Training GroupMe using this link - F90 AGENT TRAINING - or through the #bootcamp channel in discord.

b. Our in house sales trainer will be hosting regular training throughout the week. Use the GroupMe to stay informed on the daily/weekly schedule and meeting details.