



Hello and welcome to our agency. Below you will find information on how to register in SureLC, our e-contracting system. For an overview of the system click:

<https://www.youtube.com/watch?v=LeZyIpE8t2k>

The information below will guide you on how to register in SureLC, create your contracting profile and request carrier contracts as needed. *\*\*\*Please Note: Google Chrome or Firefox are the preferred internet browsers for use with SureLC\*\*\**

**Registration:** Use ***THIS LINK*** <https://surelc.surancebay.com/sbweb/agency/625> to access SureLC.

- Once on the log in screen, click **New User**. (Even if you use SureLC through another agency, if this is the first time contracting under this agency, you still need to click **New User**)
- If you need help registering, click: <https://support.surancebay.com/hc/en-us/articles/214272038-Registering-a-Producer-in-SureLC-Producer-View>
- Once you are registered and logged into the system, click **My Info** to create your online contracting profile.

#### **NIPR Tab:**

- Shows basic demographic information on file at NIPR
- Information can be changed on this screen, but will not be changed at NIPR.
- Once all required information is entered, the **NIPR Tab** at the bottom of the screen will show a green check mark.
- If you need help on this tab, click: <https://www.youtube.com/embed/U7gWudByoSI?autoplay=1&hd=2&vq=highres>

#### **DBA Tab:**

- How are you doing business with our agency?
- *Individual* (carrier pays you directly)
- *Business Entity* (carrier pays your firm)
- *Licensed Only Agent* (someone other than the carrier pays you)
- Once all required information is entered, the **DBA Tab** at the bottom of the screen will show a green check mark.
- If you need help on this tab, click: <https://www.youtube.com/embed/L-wpd8vYQIA?autoplay=1&hd=2&vq=highres>

#### **Questions Tab:**

- These are 19 of the most common background questions asked on carrier contracting forms.
- If you answer *Yes* to any of these questions, be sure to either upload an explanation document or create one using the SureLC system.
- Once all required information is entered, the **Questions Tab** at the bottom of the screen will show a green check mark.
- If you need help on this tab, click: <https://www.youtube.com/embed/6628WZeHmuE?autoplay=1&hd=2&vq=highres>



### **EFT Tab:**

- Click *Upload Business/Personal Voided Check*.
- If you are signed up as a *Licensed Only Agent* on the **DBA Tab**, you will not see the **EFT Tab**.
- Once your check is uploaded, enter the Routing and Account numbers and choose an account type.
- Once all required information is entered, the **EFT Tab** at the bottom of the screen will show a green check mark.
- If you need help on this tab, click:  
[https://www.youtube.com/embed/oWTR5\\_JLFFE?autoplay=1&hd=2&vq=highres](https://www.youtube.com/embed/oWTR5_JLFFE?autoplay=1&hd=2&vq=highres)

### **History Tab:**

- Here you can enter 7 years of address and employment history
- This information is not mandatory in order for you to request carrier contracts. Whether you enter this information or not, the **History Tab** will not show a green check mark.
- If you need help on this tab, click:  
<https://www.youtube.com/embed/KH7ITsGfyKA?autoplay=1&hd=2&vq=highres>

### **Training Tab:**

- Verify your *FINRA* information, if applicable.
- **AML Training:**
  - *None*
  - *LIMRA*: Enter date of completion. Upload completion screen shot or click Download From LIMRA if you know your LIMRA password
  - *Other*: Enter date of complete and upload certificate.
- Enter any honors you hold.
- Once all required information is entered, the **Training Tab** at the bottom of the screen will show a green check mark.
- If you need help on this tab, click:  
<https://www.youtube.com/embed/TVv2fVGShzw?autoplay=1&hd=2&vq=highres>

### **E&O Tab:**

- Click *Upload Existing E&O*
- Enter policy information
- Click *Upload Certificate*
- Once all required information is entered, the **E&O Tab** at the bottom of the screen will show a green check mark.
- If you need help on this tab, click:  
<https://www.youtube.com/embed/wHadhnNwHP8?autoplay=1&hd=2&vq=highres>

### **Scan Tab:**

- Upload any other ancillary documents that need to be included in your contracting profile by clicking the blue file folder icon. (i.e. annuity certificate, articles of incorporation ect...)
- Click *Signature Capture* to digitally create and save your signature.



- Once all required information is entered, the **Scan Tab** at the bottom of the screen will show a green check mark.
- If you need help on this tab, click:  
<https://www.youtube.com/embed/RQKN1PpXpKQ?autoplay=1&hd=2&vq=highres>

**Requesting Appointments:**

- Click *Appointment Request* in the upper right hand corner of the screen and choose *New Request*.
- Choose a carrier and request type, and then click *Next*. (you can only choose one carrier at a time)
- Choose a state or states and a product or products, and then click *Next*.
- Answer all carrier specific miscellaneous questions, uploading any supporting documentation as needed, and then click *Next*.
- All carriers in SureLC require that you preview the contracting paperwork before submission to the agency. Scroll to the bottom, then click *Confirm* in the upper right hand corner of the screen and choose *Apply My Signature*.
- If you need help on this tab, click:  
<https://www.youtube.com/embed/Uby99MzW0E4?autoplay=1&hd=2&vq=highres>