

1. Need for Contracting

Please text onboarding specialist **Madison Boinski at 760-983-6783** the information below IN ONE COMPLETE TEXT MESSAGE. This way your manager can copy and paste the **one text** fast and efficiently to the contracting department.

First, Last Name:

City, State:

Email:

Phone:

2. E&O Coverage

The carriers require you to have Errors and Omission insurance coverage. This is to protect you in case you make a mistake and a client sues you. Very very rare this would ever happens, but hey we are in insurance. So makes sense they would want to insure our financial well-being.

1. Select new licensed agent. \$26.25 Plan
2. Do new registration
3. Select new agent
4. **Select A** (if you want to just do insurance) **Select B** (if you want to sell annuities)

[Link E&O Coverage](#)

3. Wait About 3 Days for Emails

- Wait about 3 days for emails to start coming in for the following: Welcome email from agency, HCMS/SureLC/Gateway Portal and slack invite.

4. Welcome Email from Agency (EMAIL)

- An email sent from the Agency Admin/Manager giving you instructions on your next steps to getting contracted
 - Make sure you check spam/junk folders as well, sometimes they tend to end up there.

5. HCMS (EMAIL)

****You will want to request contracting for Aetna, Foresters, TransAmerica and American Amicable in HCMS.**

- An email link will be sent to you to onboard to **HCMS:**
***1st Email from** Support HCMS Subject Line **“Family First Life (FFL) – Onboarding for New Agent”** (Search Email for this)

HCMS is FFL's internal agent management system. HCMS will include your hierarchy, compensation, writing numbers and eventually your downline agents.

The first step is to verify and edit all personal details. Please ensure that your name appears exactly as it does on your insurance license, edit your email address, phone, SSN as needed and **you must input your NPN/NIPR Number if you want to be contracted and paid by the carriers.** Double check that your upline and compensation level is correct as these will be used for contracting with all carriers. If you have questions, please contact me.

- ***2nd Email from** Support HCMS Subject Line **“Family First Life (FFL) – Onboarding Completed”** (Search Email for this)

This email will take you back to your HCMS account where you can verify that all of the information you entered in the previous step is absolutely correct. If you see any errors, please contact me.

***3rd Email from** Support HCMS Subject Line “**Family First Life (FFL) – Contracting Process**” (Search Email for this)

This email will take you to your SuranceBay (Sure LC) account. This is where all your contracts with the carriers will be requested and managed. If you have previously used SuranceBay, please change your password upon entry and verify that the affiliation at the top of the screen shows FFL America. If it does not show this, please let me know before you proceed.

- Please make sure to bookmark the login page for easy access in the future: [HERE](#). If you have not filled out your information yet, please do so; NPN and SSN.
- Look for an email for **Surancebay/SureLC**. This platform is where you will submit licenses and banking information as well as **contracting requests** to the carriers.
- Once you complete **contracting requests in Surancebay/SureLC**, please go back to **HCMS**, and click the **[+]** sign on the top left hand side, please select **New Carrier Request** in the drop down, then select **New Carrier - SureLC Link**. This will send you a link specific to the carrier you select from the dropdown box.

6. SureLC / Surancebay (EMAIL)

- *****You will want to request contracting for **AIG, Mutual of Omaha, and John Hancock** in Surancebay/SureLC**
- You will receive an email after onboarding through HCMS, this platform is where you will complete and upload AML, purchase E&O and banking information before sending contract requests.
- Please reach out to me if you have not receive this email link within 24 hours and I will resend it. It will sometimes end up in the spam folder.
- Complete the contracting requests for the carriers that are preloaded in the **Surancebay** platform. You will need to complete this process per carrier and **Confirm/Apply Signature**, which will change it to BGA status (Broker General Agent). This means corporate will now send these to the carriers. If it does not show BGA status you need to complete the contracting request.

- After 2-3 days of contracting request showing **BGA status** it should go to **Carrier Status**. This is when you will need to start calling the carriers you submitted contracting requests with and ask for a “**Contracting status update,**”

Surancebay Video Help (Short Quick Help)

Surancebay Video Help (Longer More Help)

7. Gateway Portal (EMAIL)

- After onboarding with SureLC you will get another email with a link to onboard to Gateway Portal. This is the new Family First Life (FFL) portal. It's the one-step hub through which you will be able to access all applications, including but not limited to HCMS, SureLC, StatS and ILC (Integrity Lead Center, where you purchase leads). You can login by entering your HCMS credentials.
 - If you have any questions please direct them to leads@familyfirstlife.com
 - Video below to help → <https://www.youtube.com/watch?v=0dTdlI6Ms30>

8. ILC Integrity Lead Center / CRM

- After creating your SureLC/Gateway Portal login it will take 5 hours for all information to generate to Gateway Portal
- GATEWAY, the new Family First Life (FFL) portal. It's the one-step hub through which you will be able to access all applications, including but not limited to **HCMS, SureLC, StatS and ILC** (Integrity Lead Center, where you purchase leads). You can login by entering your HCMS credentials
- If you have any questions please direct them to leads@familyfirstlife.com
 - Video below to help → <https://www.youtube.com/watch?v=0dTdlI6Ms30>

9. Call Insurance Carriers 2X a Week

To check on contracting and make sure it is moving smoothly along.

Carrier Phone Numbers:

- Americo: 800-231-0801
- Mutual of Omaha: 800-867-6873
- TransAmerica: 877-234-4848
- AIG/ American General: 800-677-3311

- Global Atlantic: 855-887-4487
- Athene: 888-266-8489
- CFG: 800-423-9765
- Foresters: 800-828-1540
- John Hancock: 877-606-7779
- American Amicable: 800-736-7311
- Aetna: 866-272-6630

10. You will be Emailed Producer Numbers

Receiving Writing Number

- You will receive welcome emails from the carriers as your contracting requests are accepted
- Login to the websites save user name and passwords in notes. There is a template you can use to do this at the bottom of this page.

11. Add your producer numbers to HCMS system

- ***** It is very important that you add all carriers you are contracted with on HCMS. This is how FFL track your production so you can receive bonuses and increase your comp in the future!***
- Login back into your HCMS account [HERE](#): To enter your writing numbers for the carriers you have received. Click **[+]** Select **New Carrier Request** in the drop down, then Select **Missing Carrier/ Writing Number** and input the writing number for the specific carrier you are accepted with, make sure to **Send Request** once completed.

Please reach out if you have any questions.

Thank you,

Valerie Begauy

Administrative Specialist

Cell: 602-579-0734

Email: valhelpsinsurance@gmail.com

Family First Life Rush

States you can't get contracted in.

For all carriers. NY

For **American Amicable** you can't get contracted in: IA, MA, MI, NH, NJ, NY, RI, VT

Save in Phone Notes (Copy, Paste, Fill In Your Info)

(YOUR NAME) - LIFE INSURANCE CONTACTS

Submit Weekly WEDNESDAY NIGHT. Numbers Link Under FFL RUSH

<http://americasubmit.com>

National Producer / License#

SuranceBay

(personal link is emailed to you, put here)

UN: PW:

CRM

<https://ww3.familyfirstlife.com/login.aspx>

UN: () PW:()

Add people to CRM

<https://www.loom.com/share/ca26a3bc48b748978a0fb4b10bba5753>

HCMS <https://hcms.chims.uppatop.com/login>

UN: () PW:()

Licensed in states: ()

Medical History Reports

Milliman IntelliScript 877-211-4816

rxhistories.com

MIB.com

AIG

Producer #:

Agent Support: 1 (800) 677-3311

Online Portal: www.aig.com/connext

Pricing Link: <https://www-115.aig.com>

FE portal: www.aig.com/gjwl

UserName: () PassWord:()

Atena

Producer #:

Agent Support: 866.272.6630

Pricing: <https://www.aetnaseniorproducts.com/ssi>

E-App: aetnaseniorproducts.com

UN: () PW:()

Americo 3, 3,

Producer#

Agent Support #: 1-800-982-8146

Verbal Amendment: 1-866-214-0054

FE OVER PHONE: 8552488327

Pricing Link: <http://quote.americo.com>

Online Portal: <http://agent.americo.com>

Submit App: submit@americo.com

MedSup Quote: www.quoteamericamedsup.com

UN: () PW:()

American Amicable

Producer#

Agent Support #: 1-800-736-7311

Pricing Link: <https://www.insuranceapplication.com/cgi/webapp/mlogin.aspx>

Online Portal: <https://www.americanamicable.com/marketing-login.html>

E-Apps: <https://www.insuranceapplication.com/AppPage/index.html>

Underwriting: underwriting@aatx.com

UN: () PW:()

Foresters

Producer#

Agent Support #: 1 (866) 466-7166 NB 1,2,1

Apptical #: 1 (866) 844-9276

Client Support #: 1-(800) 828-1540

Client Cancel Fax # 1-866-300-3830

Pricing Link: www.forestersquotes.com

Online Portal: <https://portal.foresters.biz>

Fax: 1877-329-4631

UN: () PW:()

Mutual of Omaha

Producer#

Agent Support #: 1-800-775-7896

Client Support #: 1 (800) 775-6000

Client Interview # 1 (800) 775-3000

Pricing Link: (on App Store)

Email Apps. Lifeapps@mutualofomaha.com

Underwriting: liferequirements@mutualofomaha.com

Online Portal: <https://accounts.mutualofomaha.com>

UN: () PW:()

Prosperity

Agent#

Agent Support: 1-877-725-4872

Pricing: <https://insuranceadmin.com/agent/login.php>

Agent Portal: <https://insuranceadmin.com/agent>

UN: () PW:()

John Hancock

Payroll#

Support Vitality 1-866-595-7361

Contracting # 877-606-7779

Portal:<https://agent.johnhancockinsurance.com/login/>

E-APP: <https://instant-apply.johnhancockinsurance.com/intake-brokerage>

Pricing Link: <https://instant-apply.johnhancockinsurance.com/get-a-quote-brokerage>

Benefits: <https://www.johnhancockinsurance.com/vitality-program.html>

Email: simplifiedtermlicensing@jhancock.com

Look Up Policy: <https://instant-apply.johnhancockinsurance.com/esign>

UN: () PW: ()