

ONBOARDING GUIDE FOR PRODUCERS

Quick Start Guide

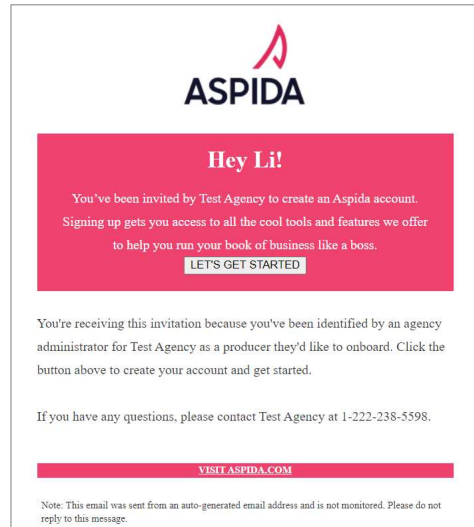


Let's get onboarding! Onboarding with Aspida is super simple, and can often be done within just a few minutes, thanks to slick integrations with NIPR and SureLC. Here's a quick guide to get you on your way.

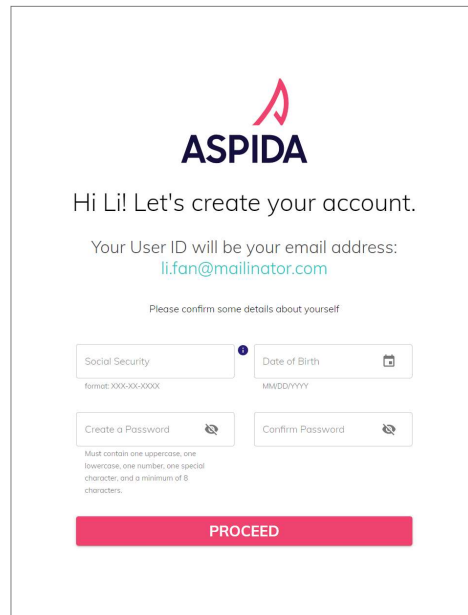
ACCEPT YOUR INVITE

Once contracting paperwork has been submitted by you or your agency through SureLC, or directly from your agency, **you will receive an email from Aspida** inviting you to join the agency's roster.

Click **Let's Get Started** to continue.



You will be taken to the account creation screen. Enter your Social Security Number and Date of Birth, and then create your password.



Enter your phone number to set up multi-factor authentication. Then, enter the code you receive to complete verification and proceed to

ASPIDA LIFE INSURANCE COMPANY

2327 Englert Dr. | Durham, NC 27713 | P: 1 (833) 4-ASPIDA | Aspida.com

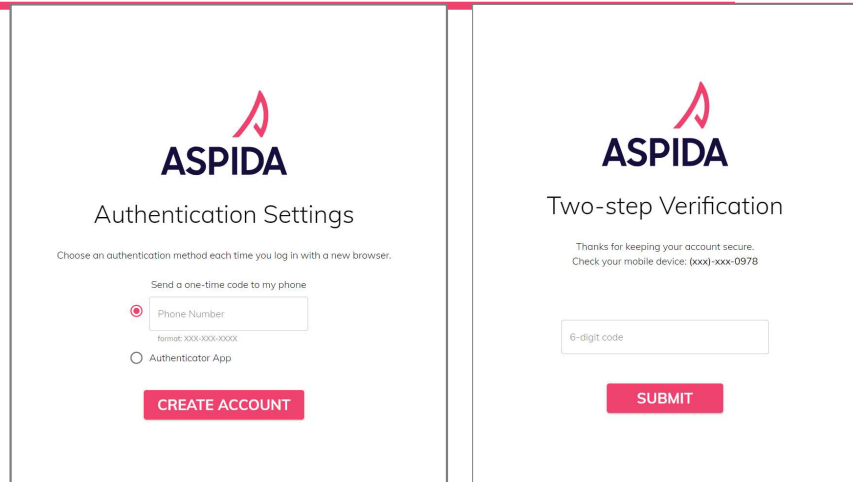
newproducerqrg051622

ONBOARDING GUIDE FOR PRODUCERS

Quick Start Guide

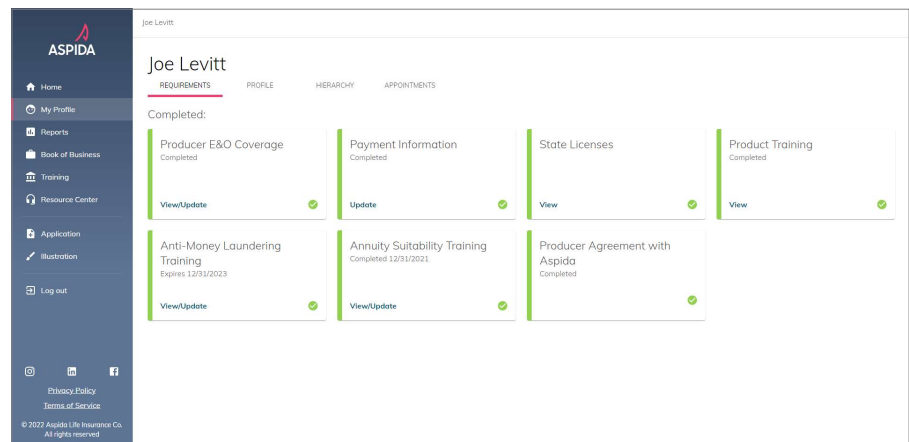


the Aspida Portal.



COMPLETE REQUIREMENTS

The Aspida Portal will pull data from NIPR and SureLC and automatically mark any applicable requirements as complete. When you first enter the Aspida Portal, you will see the requirements page, which will display any outstanding requirements you need to complete before beginning your first eApplication. As you complete requirements, they will turn green to show they are completed or blue to note they are pending a final review from our team.

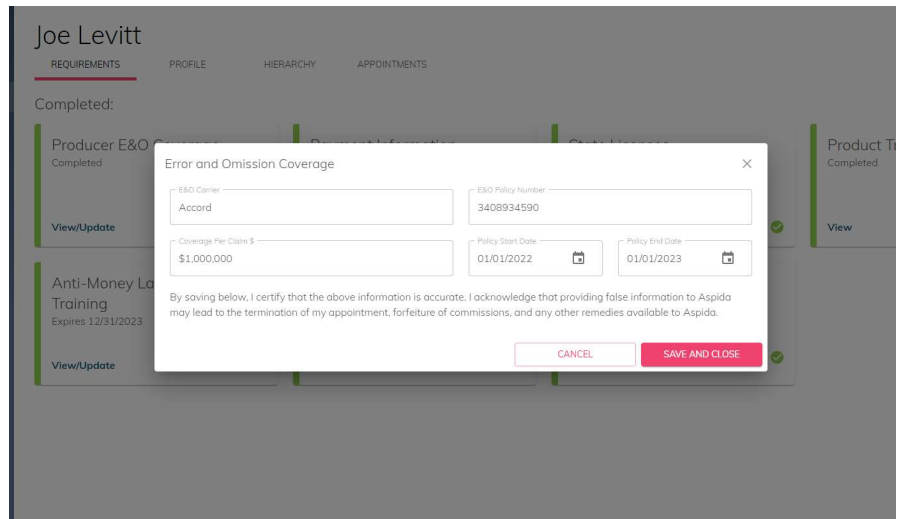


ONBOARDING GUIDE FOR PRODUCERS

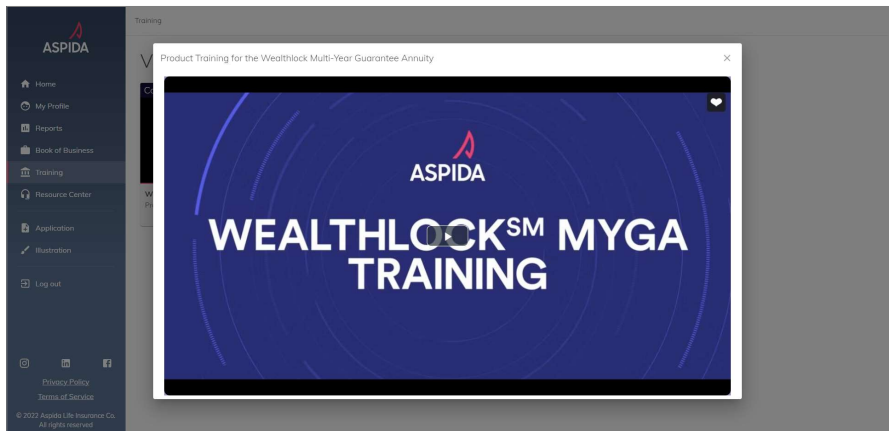
Quick Start Guide



To complete a requirement, click on the tile and enter the required information.



To complete product training, click the tile or navigate to the Training tab on the left-hand side. Click the training you wish to complete and click play. Make sure you watch all the way to the end or the training won't be marked as completed! (Don't worry, it's short!)



ONBOARDING GUIDE FOR PRODUCERS

Quick Start Guide



MANAGING YOUR PROFILE

You can edit your demographic and contact information by navigating to the Profile tab under My Profile, entering the updated information, and clicking save.

Joe Levitt

REQUIREMENTS PROFILE HIERARCHY APPOINTMENTS

Demographics

First Name: Joe Last Name: Levitt Date of Birth: 06/02/1964

Phone Number: 910-524-0978 Phone Extension: M/F: M Email Address: joe.levitt@mailinator.com

Business Address Mailing Address Residential Address

SAVE

You can also request appointments from the appointments tab. Only preappointment states are available to be requested. All other state appointments will be submitted automatically when you submit your first piece of business in a state.

Joe Levitt

REQUIREMENTS PROFILE HIERARCHY APPOINTMENTS

State Appointments REQUEST APPOINTMENT

State	County	Status	Date Appointed
GA	Not Applicable	Approved	05/02/2022

Rows per page: 10 1-1 of 1