

SureLC for Producers Overview

This article provides an overview of the SureLC for Producers application. After logging in to the application either directly or through Single Sign-On (SSO) from their agency, producers are first taken to the My Profile page. The navigation menu on the left allows producers to access the various pages that make up their SureLC profile and perform other actions such as creating a new carrier contracting requests.

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Navigation Menu





The screenshot displays the SureLC application interface. On the left is a dark navigation menu with the following items: My Profile, Doing Business As, Bank Info, Licenses, FINRA, Questions, History, CE & Training, E&O Insurance, Signature, Profile Documents, Contracting Requests, Carrier Contracts, and Help & Support. A red arrow points from the text 'Navigation Menu' to the menu items. The main content area shows the 'My Profile > Producer Info' page. It contains several sections: Full Name (Title: Mr, First Name: JAMES, Middle Name: A, Last Name: BROWN, Suffix: Jr.), Personal information (SSN: #####, NPN: [redacted], Date of Birth: [redacted], Gender: Male, Marital Status: Single), Contact information (Email: [redacted], Phone: [redacted], Fax: [redacted], Cell: [redacted]), Driver's License (State: Connecticut, Number: [redacted], Expiration date: [redacted]), and Address Information.

The menu is comprised of two main sections: **My Profile** and **Contracting**, plus a **Help & Support** page. **My Profile** and its related pages contain personal information about the producer, background information, banking info, licenses, and more.

The **Contracting** section at the bottom of the menu is where producers can submit new contracting requests, check the status of outstanding requests, and view any existing carrier contracts. Please refer to the table below for more information about each page.


Please note: Producers should review the information shown on all pages to verify it is current and correct. Failure to do so may result in delays or rejection of any contracting requests.

 My Profile	<p>The My Profile page is the starting point when producers login to SureLC. The name, SSN, NPN, and DOB are imported directly from the producer's PDB and are not editable.</p>
 Doing Business As	<p>The Doing Business As page is where the producer's DBA type is specified. This page indicates which forms are required for new carrier contracting requests and how producers will be paid. Click Here for more information about the Doing Business As page.</p>
 Firm	<p>The Firm page is only shown when the producer is doing business as a Business. This page contains information for the Firm that is specified on the Doing Business As page.</p>
 Bank Info	<p>The producer's banking information is added on the Bank Info page. Bank routing numbers MUST be added for producers who are doing business as Individuals and Entities. Please note for License-Only Agents (aka 'Solicitors') this page will not be shown.</p>
 Licenses	<p>The Licenses page shows ALL of the producer's state licenses by status (Active, Expired, etc.). This information is imported from NIPR and updated on a regular basis. Producers can renew state licenses right from SureLC! Click Here for more info.</p>
 FINRA	<p>The FINRA page is where a producer indicates if they are a registered representative. If Yes then SureLC will attempt to automatically import their CRD#, Broker/Dealer information, and other FINRA-related details such as State Registrations, Expiration Dates, etc.</p>
 Questions	<p>The Questions page contains some of the most common background questions. Producers must answer ALL background questions before they will be able to submit carrier contract requests. Background questions and answers are included on all carrier contract requests.</p>
 History	<p>The History page is where producers can provide the last 7 years of employment and address history. Please note this information is optional.</p>
 CE & Training	<p>The CE & Training page is where producers provide proof of current Anti-Money Laundering, Annuity State, LTC State, and AHIP Medicare training certification to agencies. Click Here for more information on how to use this page.</p>
 E&O Insurance	<p>The E&O Insurance page is where producers add their existing E&O policy information or purchase new E&O coverage.</p>
 Signature	<p>The Signature page is where producers MUST review and sign the signature page before they can create any new carrier contracting requests. Use this page to review and/or to create a digital signature on-screen.</p>



 Profile Documents	The Profile Documents page contains ALL the documents uploaded to the profile. For example, AML certificates, E&O declaration pages, voided checks, signature authorizations, and more can be found here. Click Here for more details.
 Contracting Requests	The Contracting Requests page is where producers can create and submit contracting requests to their agency and/or check the status of outstanding requests. Click Here for more details.
 Carrier Contracts	The Carrier Contracts page shows a producer's carrier contracts that were submitted to SureLC. Click Here for more details.
 Help & Support	Visit the Help & Support page to see contact information for your agency and training materials in SureLC's Help Center.

Profile and Contracting Notices

Certain information is required in order for a producer to create and submit a contracting request to their agency. When this information is missing, SureLC displays yellow and/or red notices indicating what information is necessary. These appear as dots on the menu, and as full text notices on each relevant page.

 Bank Info ●	There is no bank account information in your profile
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Yellow dots/notices indicate which pages contain information that is necessary to submit contracting requests to their agency. This information will not prevent the producer from creating a request. Some of this information can be provided during the submission process.

 Signature ●	 A signature authorization is required for contracting with most carriers. Use the Draw Signature button below, or upload a signed signature authorization form.
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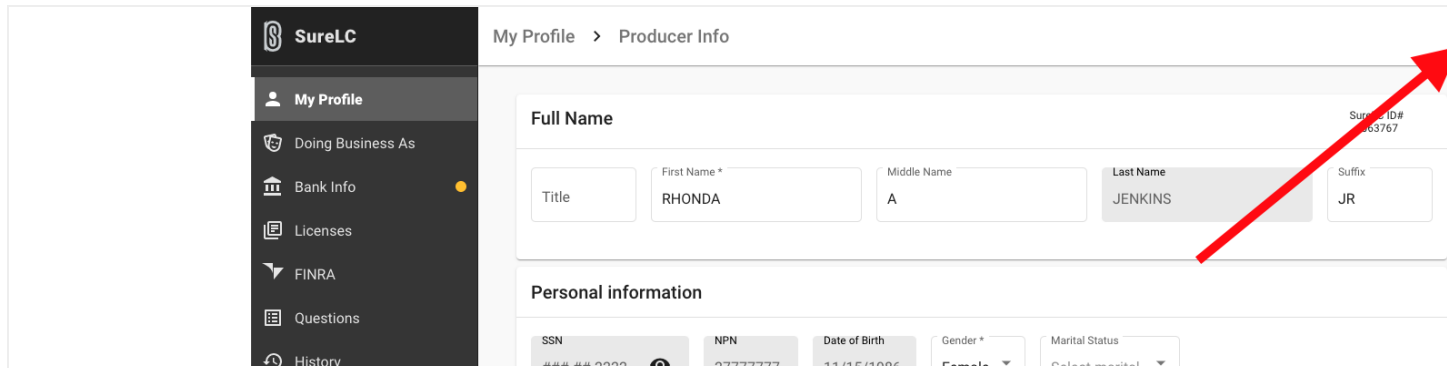
Red dots/notices indicate which pages are missing information that is required BEFORE the producer will be able to create a contracting request.

Note: When the notice includes a **FIX** button you can click on it to be taken to the page where the information can be added or corrected.

User Menu

Click the circle in the top right corner of the application to open the User Menu. This menu contains:

- Information about the logged-in user
- A link to **Sign out** of SureLC
- The link to **Account Settings** where you can change your UserID and Password (if not using SSO from your agency)
- Your agency's contact information



The screenshot displays the SureLC user interface. On the left is a dark navigation menu with the SureLC logo and several options: My Profile, Doing Business As, Bank Info (highlighted with a yellow dot), Licenses, FINRA, Questions, and History. The main content area is titled 'My Profile > Producer Info'. It features a 'Full Name' section with input fields for Title, First Name (RHONDA), Middle Name (A), Last Name (JENKINS), and Suffix (JR). A red arrow points to the 'Last Name' field. Below this is a 'Personal information' section with fields for SSN, NPN, Date of Birth, Gender (Female), and Marital Status (Select marital).



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Sign out



Account & Setting



Errors

Questions?

Please contact you agency

Awesome Group Inc.



(222) 219-8702



test198702.1@[REDACTED].com

Last Name

JENKIN

tal Status

ect marital...