

# How to Register with your Agency

To register with an agency that uses the SureLC platform the agency will send instructions with their weblink to start the registration process. Whether this weblink is sent directly to you via email or is accessible on their website, select the link to be redirected to their registration page. In the following example, this is the registration page for the Awesome Group with the contact information shown on the top right. Enter the required information in the fields provided to register with your agency. Additional details are provided below.

**SureLC**  
#1 in Licensing & Contracting

**Create Your Account**

Please fill your SSN and Last Name below. We will use it to check information about you in the NIPR Producers Database.

1 SSN \*

2 Last Name \*

3 Date of Birth \*

4 Enter a valid email address to use as your Login ID.

4 Email \*

5 Select the affiliation you are associated with.

5 Affiliation

6 CREATE ACCOUNT

By pressing "CREATE ACCOUNT" you acknowledge that you read and understand this Authorization and you authorize SuranceBay, LLC to pull your PDB report from NIPR®.

**Questions?**  
Please contact your agency

**Awesome Group**  
(813) 555-1212  
contracting@awesomegroup.com

**Authorization To Obtain PDB Report**

The National Insurance Producer Registry ("NIPR®") maintains a report on every licensed producer known as the Producer Database Report ("PDB report"). NIPR® currently collects data from all 50 states, the District of Columbia and Puerto Rico. The PDB report consolidates each producer's licensing information, as updated on a regular basis by participating state insurance departments, as well as data from external sources such as the Regulatory Information Retrieval System, and includes the following information: (1) general producer demographics, such as name and addresses; (2) license information, such as states licensed, license numbers, authorized lines, and license status; (3) appointment information, such as company appointments, effective date, termination date and reason; and (4) regulatory actions, if any.

The information contained in the PDB report is subject to the Fair Credit Reporting Act ("FCRA"). Only entities with a "permissible purpose" are permitted to access a consumer's credit report. This Authorization satisfies the permissible purpose requirement by serving as a written instruction by you, the consumer, to whom the report relates.

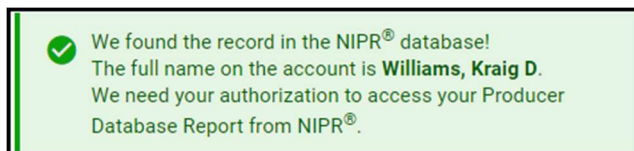
The PDB report is free to you. The NIPR® fee is covered by your agency.

**Step 1:** Enter your **SSN**

**Step 2:** Enter your **Last Name**

**Step 3:** Enter your **Date of Birth**

After entering your DOB the system will check the NIPR database to make sure you are a licensed producer. Once your account has been located, the following confirmation message will be shown. This means you can continue with the registration process by completing the remaining steps.

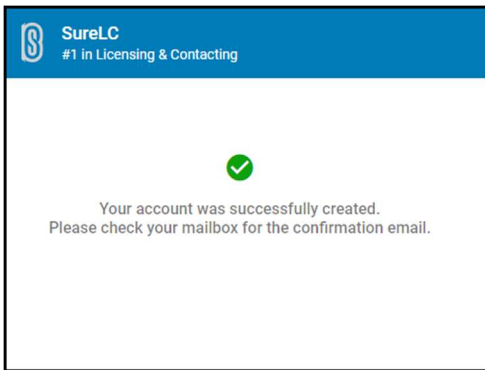


**Step 4:** Enter the **email address** you'd like to use as your Login ID.

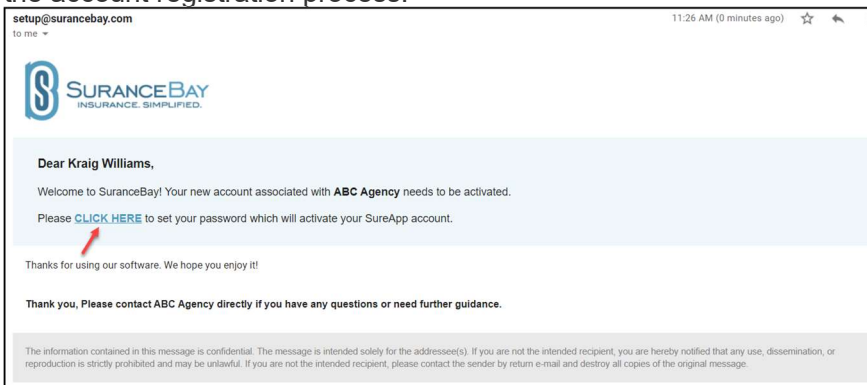
**Step 5:** If the **affiliation list** is shown select the name of the affiliation as per directions provided by your agency. If the affiliation option is not shown skip this step.

**Step 6:** Please review the authorization to obtain PDB report from NIPR shown in the right pane. After reviewing, select **CREATE ACCOUNT** to provide your authorization and to create your new SureLC account.

Once your account is created you'll see the following confirmation message:



Next, you'll receive a confirmation email at the address entered as your Login ID. The email will be sent from [setup@surancebay.com](mailto:setup@surancebay.com). Locate the email and select **Click Here** link to activate your account and complete the account registration process.



## Create your Password

At this point you'll be redirected to the following password creation page where you must create your login password. Enter your password and re-enter it in the fields provided following the rules below to make sure it's secure.

### Enter new password

Please follow the required rules to set new password for User ID: kraig.williams@surancebay.com

Password  
.....

Confirm Password  
.....




Make sure that your password meets the requirements.

- ✓ At least 8 characters long
- ✓ Contains uppercase letters
- ✓ Contains lowercase letters
- ✓ Contains digits
- ✓ Contains special character or punctuation
- ✓ Different than your previous 13 passwords
- ✓ Must not match your User ID
- ✓ Both entered password values must match

**SAVE PASSWORD**


#### Questions?

Please contact your agency

**ABC Agency**  
 (222) 216-1778  
 contracting@abcagency.com

Click **Save Password** to complete the registration process and to be logged into your new SureLC account for the first time.

The first time you log in you will need to review and accept the **SureLC SaaS Privacy Policy** and **Terms of Use**. Select the checkbox and click **Accept Policy** to continue past each screen.

**KRAIG WILLIAMS**

Questions? Contact your agency: (222) 216-1778 or test161778.1@surancebay.com

LOG OUT

## SURELC™ SAAS PRIVACY POLICY

THIS PRIVACY POLICY WAS LAST UPDATED ON 12/01/2018

SuranceBay, LLC ("SuranceBay" "we" or "us") gathers certain types of information in connection with your use of our SureLC™ SaaS platform. The SureLC™ SaaS platform (formerly known as SureApp™) includes software modules such as SureLC™, SureLC™ Datalink, SureLC™ One, SureLC™ Compliance+, and such other modules as SuranceBay may add from time to time (collectively "SaaS"). This document outlines the terms and conditions of SuranceBay's privacy policy governing the use of our SaaS ("Privacy Policy"). Specifically, it explains how we collect information from users of our SaaS, share your information, and ways you can limit our sharing of your information. SuranceBay places the highest priority on protecting the privacy of its SaaS Users. By using our SaaS, you ("You" or "User") are accepting the practices described in this Privacy Policy.

**OTHER TERMS / PRIVACY POLICY FOR CUSTOMERS**

When you become our customer, you will communicate and exchange information, including personally identifying information, with us. When forming a business relationship with us, a Carrier, a Broker General Agency ("Agency") and/or a Producer will be asked to enter into a Master Services Agreement and one or more Statements of Services with SuranceBay ("Services Agreements") that will govern the use of specific SaaS modules. The Terms of Use posted at [SureLC™ SaaS Terms of Use](#) and the Service Agreements may contain other privacy terms dealing with the use of personal information. Service Agreements supplement, and to the extent of any inconsistency supersede, the general terms outlined in this Privacy Policy. The terms of this Privacy Policy supplement, and to the extent of any inconsistency supersede, the terms of the SureLC™ SaaS Terms of Use.

### INFORMATION WE COLLECT

☒ I have read the SuranceBay Privacy Policy

ACCEPT POLICY

This completes the account registration process.