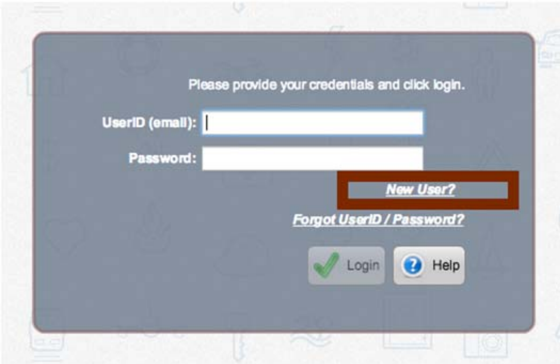
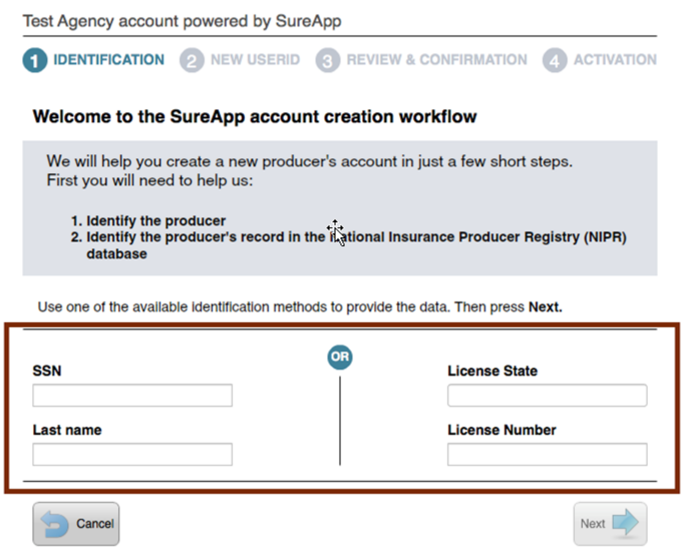
Go to https://surelc.surancebay.com/sbweb/agency/186

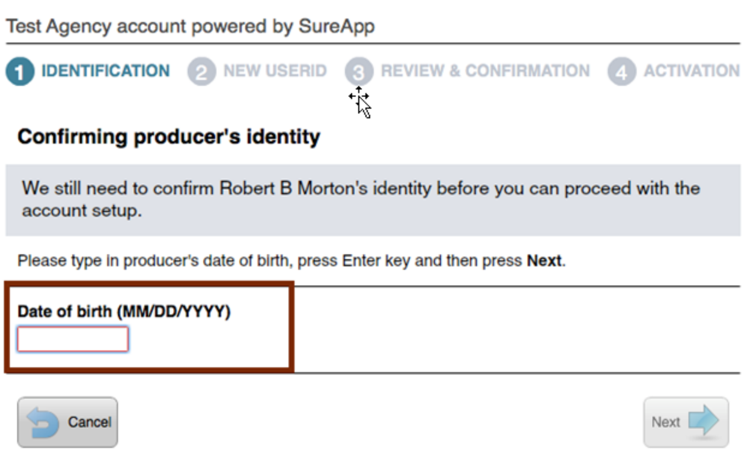
Click on **New User** to start the registration process.



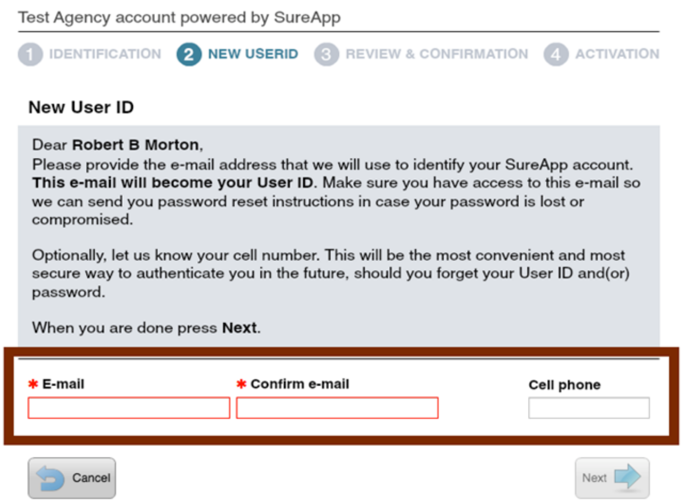
Choose to either enter your SSN and Last name OR your license state and number. Once entered, click the **Next** button.



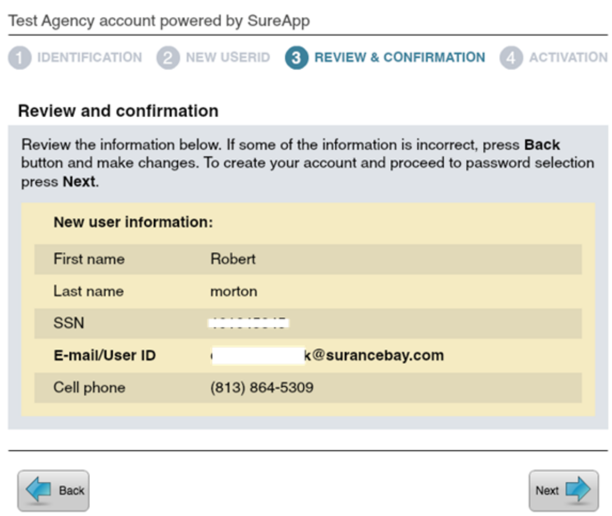
Enter your date of birth in the format shown, press Enter on your keyboard, and then click the **Next** button.



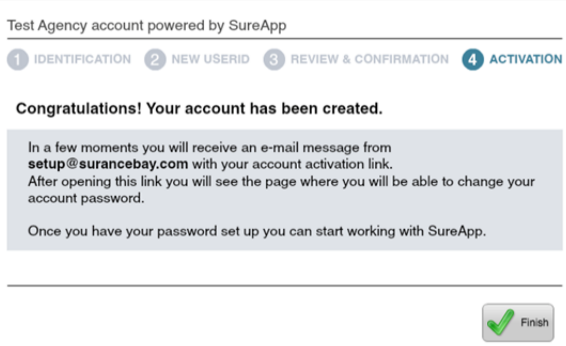
Enter your e-mail address and then enter it again to confirm. This is the e-mail address that your account activation e-mail will be sent to and it will serve as your username log in. The cell phone is optional. When done, press **Next.**



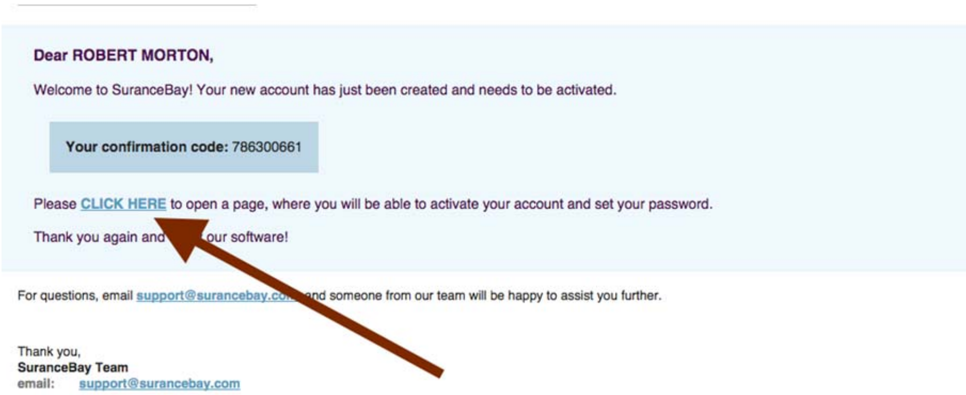
Be sure all the data on this screen is correct. If it isn't, click the **Back** button and make any necessary changes. When all your information is correct, click the **Next** button.



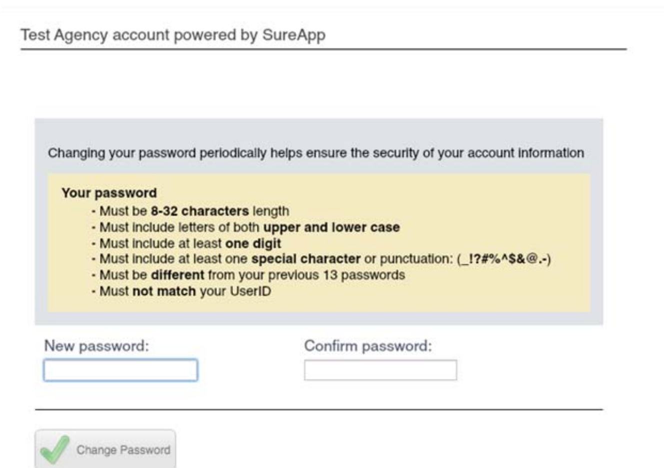
You will now see a screen that confirms that your account was created along with a message letting you know that an account activation e-mail is being sent to you from **setup@surancebay.com**.



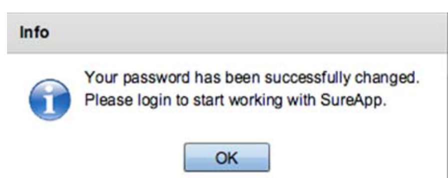
Once you receive the account activation e-mail, click on the activation link contained in the body of the message. If you don't receive the email in your inbox, check your Spam/Junk folder. *****Note: The link contained in this email is a one-time use link. If you attempt to use this link to log in at a later date, it will not work. You should go through jetter.com for future log-ins *****



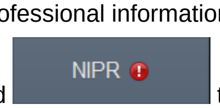
After you click the link and the new page opens, you will create your log in password. Be sure to follow the password rules stated on the screen. Once you create your password, click **Change Password.** ***Please make sure to write down your password***

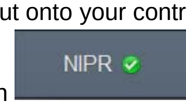


You should now see the message below and be able to log into your SuranceBay profile with your e-mail login and the new password that you just created.



When you are logged in, click on My Info

*You will now walk through the interview process that collects your personal and professional information to input onto your contracting paperwork. Anything in red indicates a required field. When a section turns from red 

to green 

that means it is complete. You will click 

in the upper right corner as you complete each section.

NIPR — This is your demographic Information. Most of the information is already entered because it was pulled from the National Insurance Producer Registry (NIPR) when you entered your name and SSN.

DBA — Select how you are doing business:
-Individual: the directly carrier pays commissions to you
-Business Entity: you are the owner or principal of an agency and the carrier pays commissions to your business/agency
-Licensed Only Agent: someone other than the carrier pays you commissions

QUESTIONS — There are 19 background questions. Please make sure to scroll down and answer all 19 questions. If you answer "yes" to any of the questions, enter the approximate date of the incident, an explanation of the incident, and upload any supporting documentation.

LICENSES — Your active license information should automatically populate from the National Insurance Producer registry (NIPR). There is nothing to do on this tab, it is more for information purposes

EFT — Most carriers require direct deposit for your commissions. Enter your bank information here.

CONTRACTS — Your current carrier appointment information is automatically pulled from the National Insurance Producer Registry (NIPR).

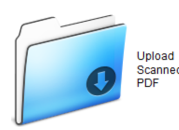
HISTORY — The information on this tab is primarily used for state licensing purposes, not for applying for a carrier appointment. There is no green check mark here. You may input as little or as much information as desired.

E&O — Most carriers require Errors and Ommission (E&O) Coverage. You are automatically covered by Art Jetter & Company's group E&O for any business written through Art Jetter & Company. This policy information is already on file.

If you have your own E&O coverage, click **Add E&O** and enter your E&O information.

TRAINING — Note any designations/honors you may have. Also, enter your Anti-Money Laundering (AML) training information, if it applies. If you completed AML through LIMRA, you can upload a screen shot by clicking the "Get it For Me" button. AML is only required for agents soliciting cash value products.

SCAN — Upload your E&O certificate, voided check, any required training certificates, etc, by clicking the blue folder.



You will also need to get your signature online which is now easier than ever and can be done with a few clicks of your mouse.

1-Click **Signature Capture**

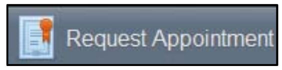
2- Read through the Signature Authorization form and click **Accept** in the bottom right corner.

3- Click **Add Signature**

3-A blank screen will appear. Use your mouse like a pen to sign your name in the middle of the blank screen.

4-Click **Done** the upper right corner when you are finished so that your signature is saved.

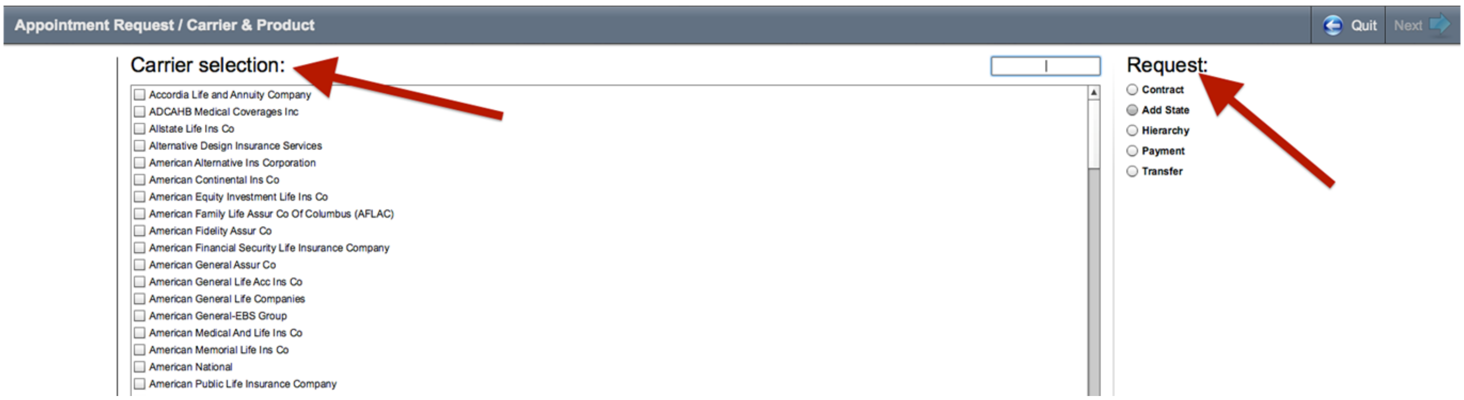
**If you are having trouble uploading any of the required documents, please just fax them to 800-770-5078 and we will upload them for you.

When all sections are complete, you will be able to click 

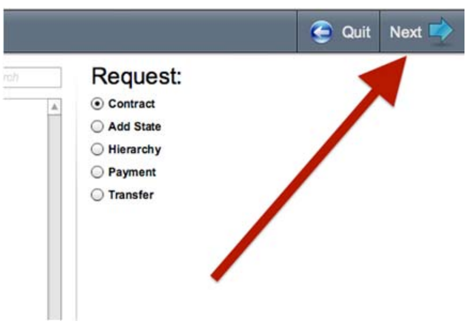
in the upper right corner and proceed to requesting the carrier appointment. If you cannot click on this button that means there is information missing, so please check that you have completed all required items.

CARRIER AND REQUEST TYPE

On this screen, choose the carrier you would like to contract with, then choose the request type. (Typically, the request type is Contract)

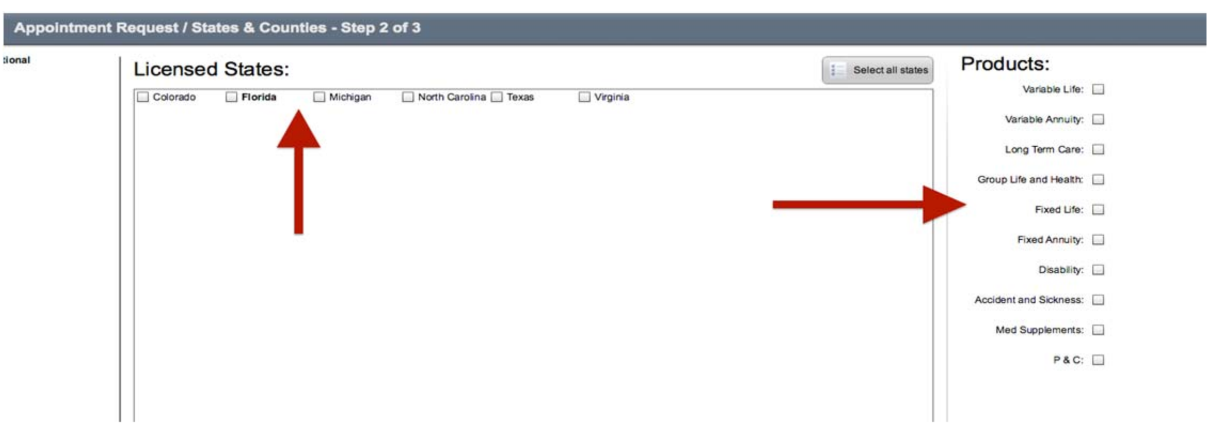


Once you have made your selections, click on the Next button in the upper right corner to move on.



STATE(S) AND PRODUCT(S) SELECTIONS (STEP 2)

On this screen, choose the state or states that you want to be contracted in and then choose the product or products that you plan to write. Only the states that you have an active insurance license in will display as available options.

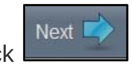


Once you have made your selections, click 

again.

MISCELLANEOUS QUESTIONS (STEP 3)

On this page, you will find some carrier specific questions. Be sure and answer all questions **in red** before clicking 

Some carriers may require additional steps before you are able to submit your request. Click 

and proceed through any additional carrier steps that are presented.

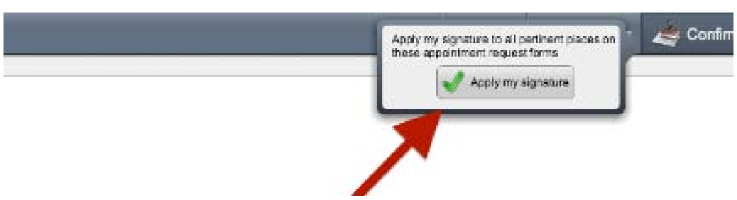
SUBMITTING THE APPOINTMENT REQUEST (FINAL STEP)

Once you have completed all the steps required for that particular carrier, you are now ready to submit the request to be processed. To do this, click on the **Submit** button in the upper right corner.

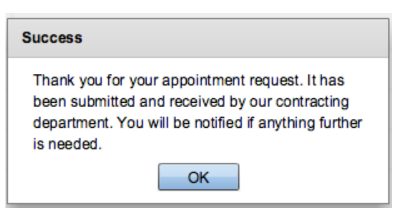
Now, the carrier requires you to scroll through the contracting paperwork.

Be sure and scroll all the way down to the bottom of the page, then press the **Confirm** button. If you cannot click the **Confirm** button, it means that you have not scrolled to the bottom of the document.

Finally, click the **Apply My Signature** button so that your signature will populate on your paperwork.



Your appointment request is complete. A successful appointment request will generate the following pop up message.



****Once you see this confirmation, please email a quick notification to contracts@jetter.com that the appoint request is complete so that it can be submitted to the carrier. If you need further assistance, please contact Rosemarie Crisomia or Jane Hardy at 800-446-7872**