SureLC

Producer User Guide

Revision: January 2021

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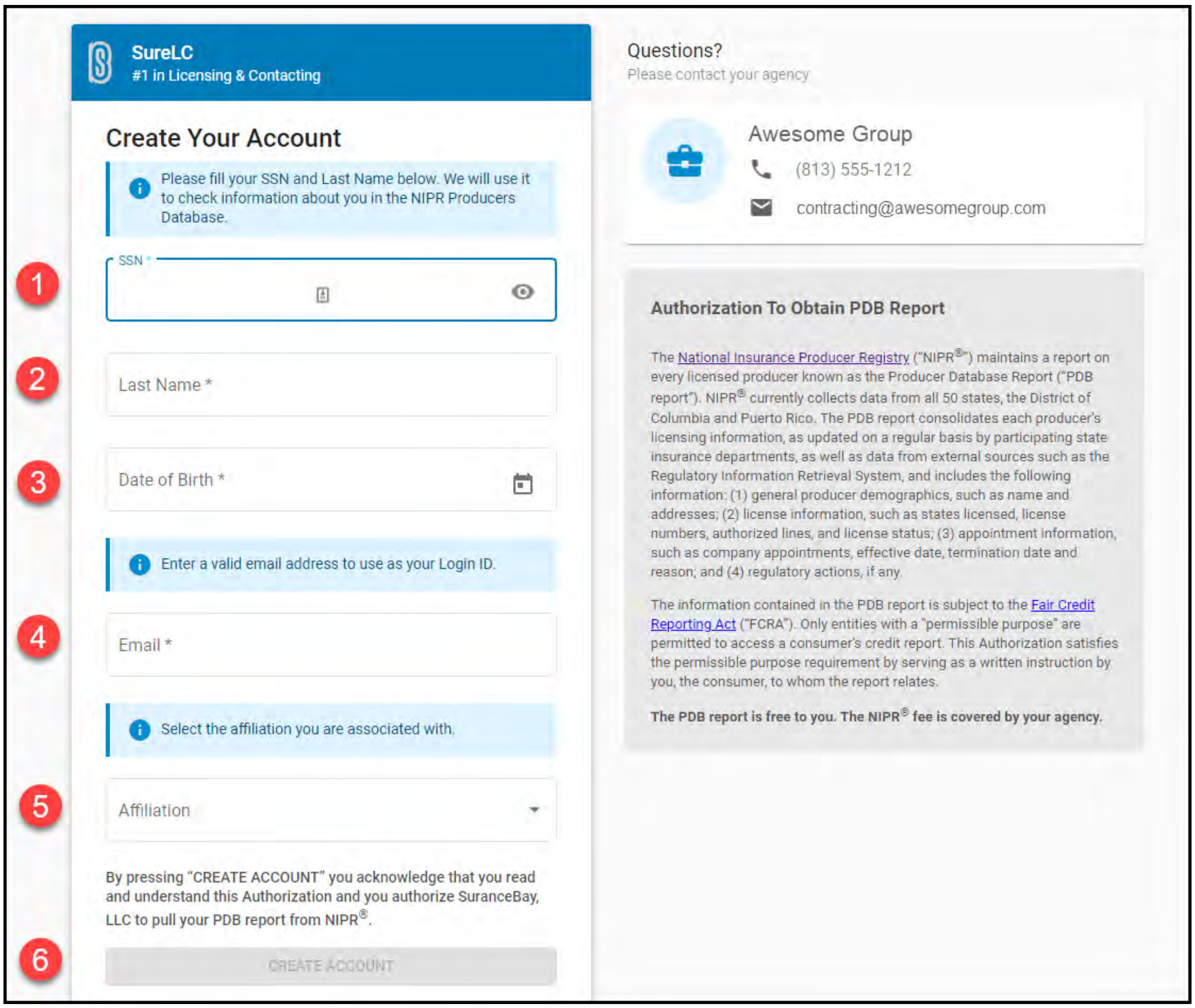
SuranceBay Producer Training Guides

1) SureLC - New Producer Registration

How to Register with your Agency

To register with an agency who 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 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.

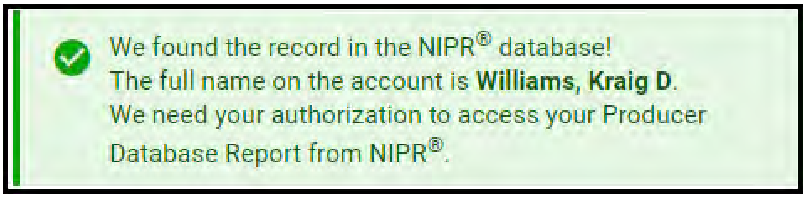


Step 1: Enter your **SSN**

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.

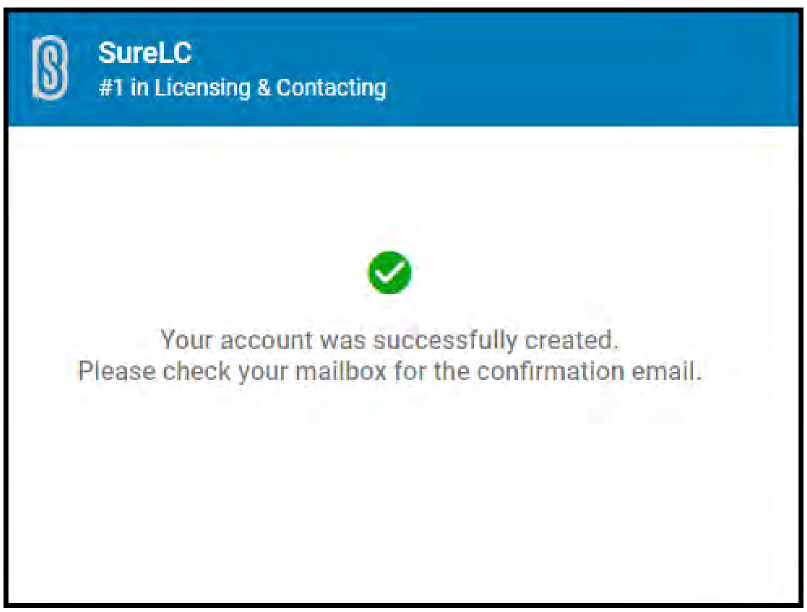


Step 4: Enter the **email address** you'd like to use as your Login ID.

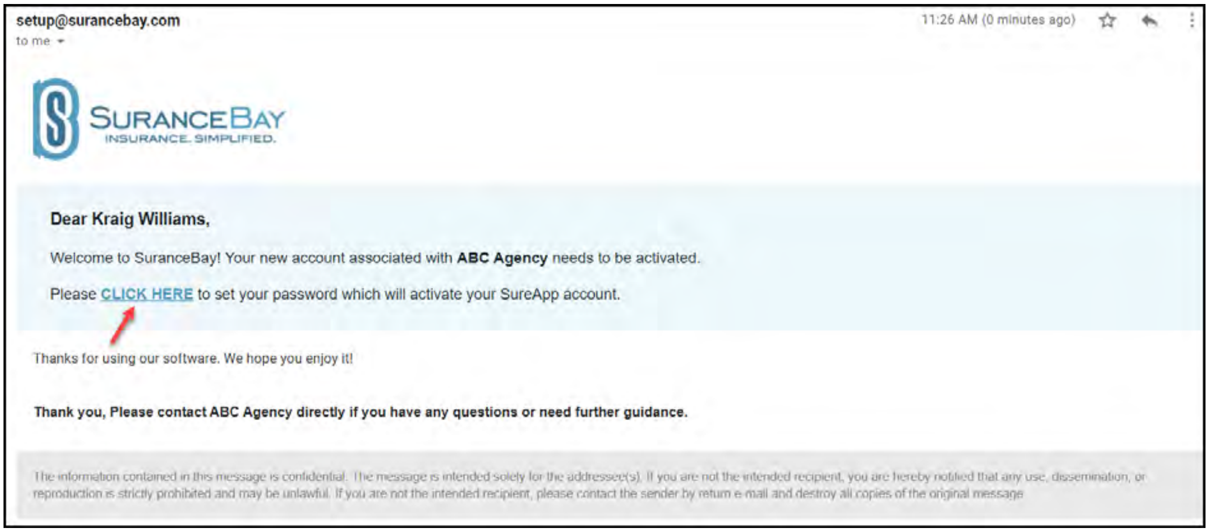
Step 5: If the **affiliation list** is shown select the name of the affiliation as per directions provided by your agency. If the affiliation option is not shown skip this step.

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:

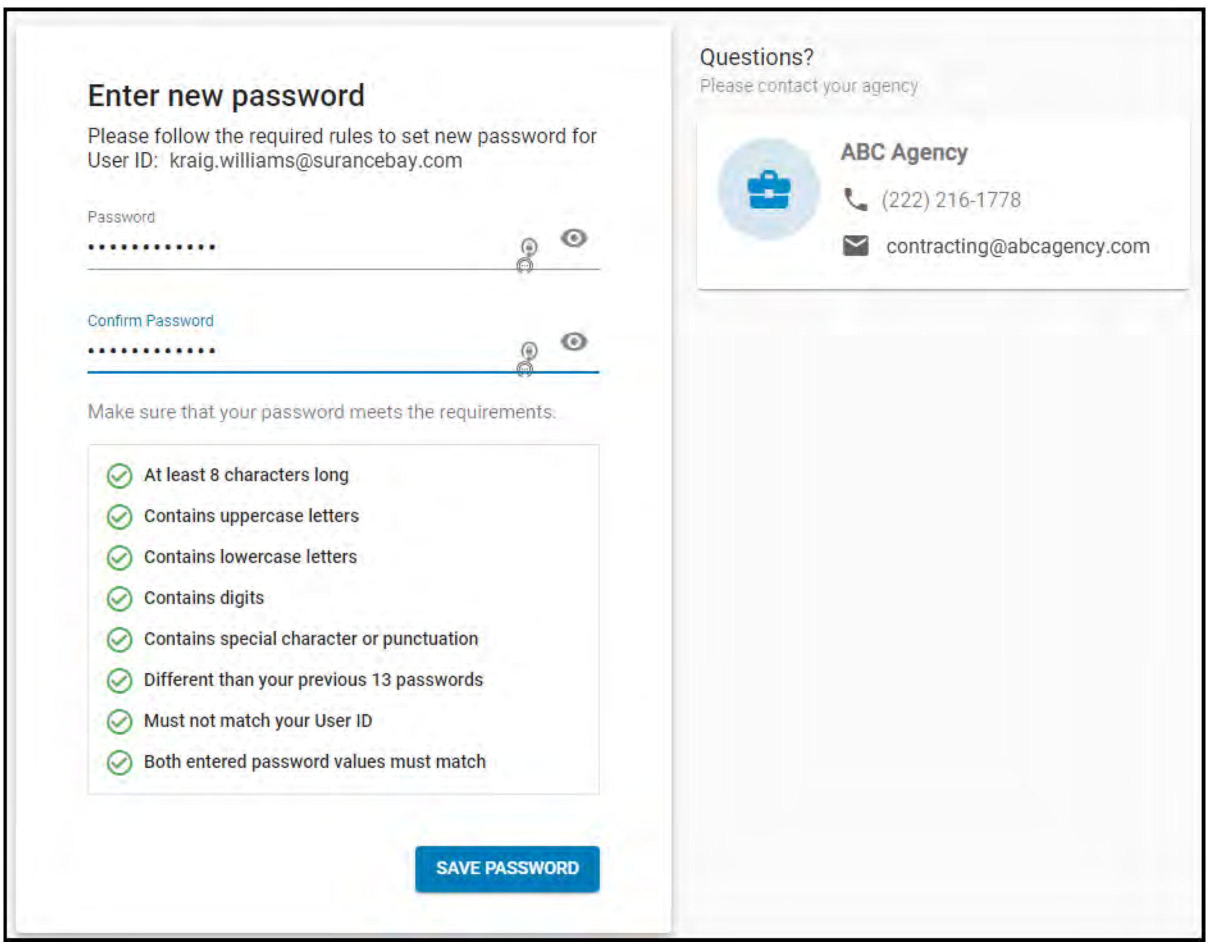


Next, you'll receive a confirmation email at the address entered as your Login ID. The email will be sent from setup@surancebay.com. Locate the email and select **Click Here** link to activate your account and complete the account registration process.



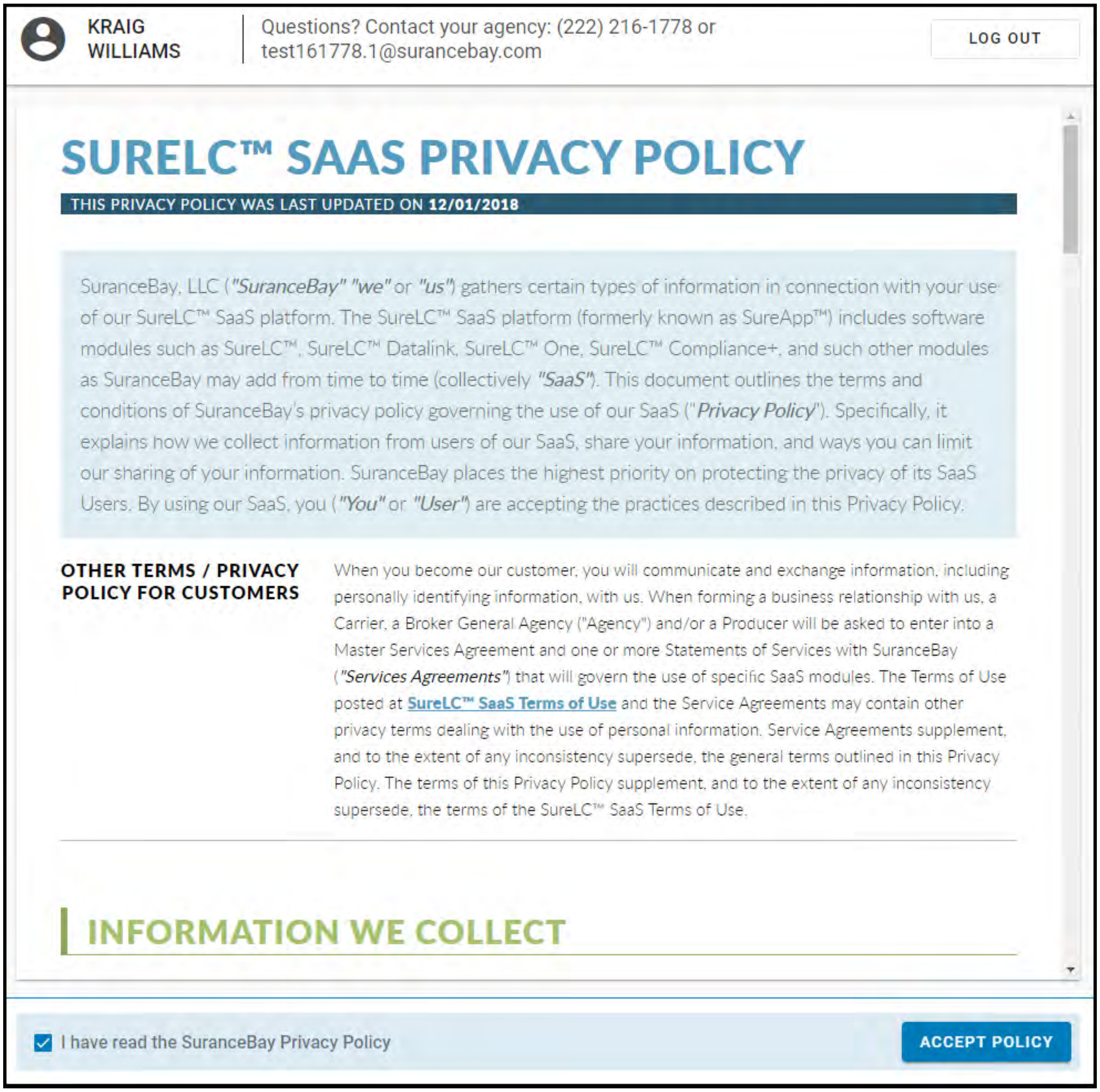
Create your Password

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.

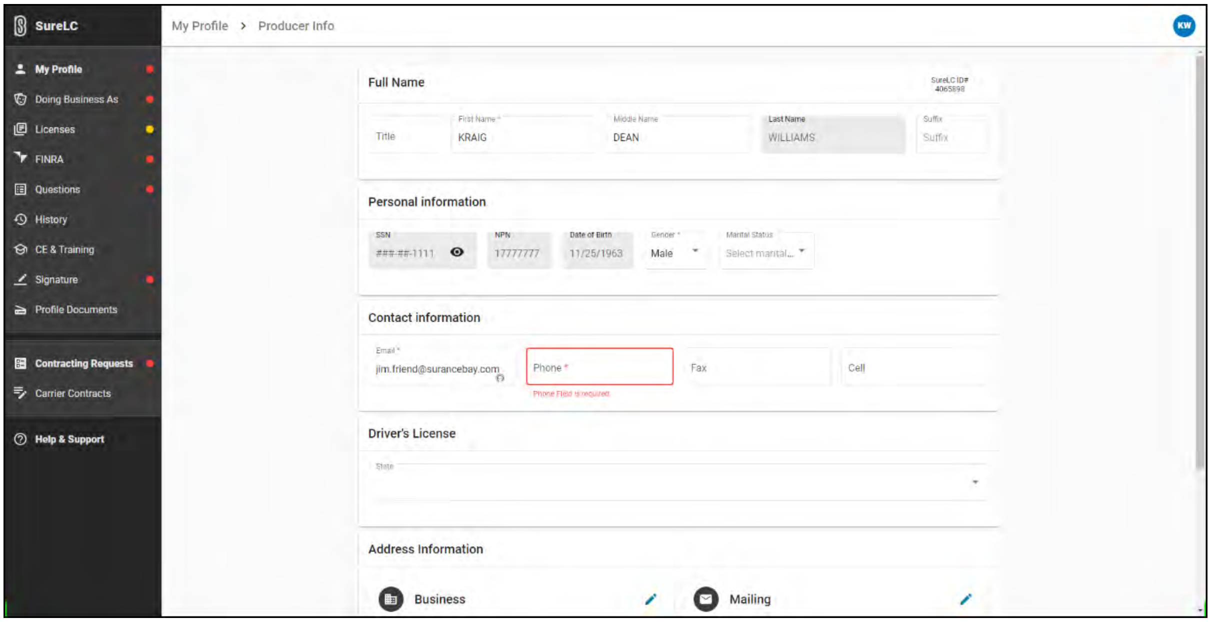


Click **Save Password** to complete the registration process and to be logged into your new SureLC account for the first time.

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.



This completes the account registration process.



2) SureLC Logins & Passwords

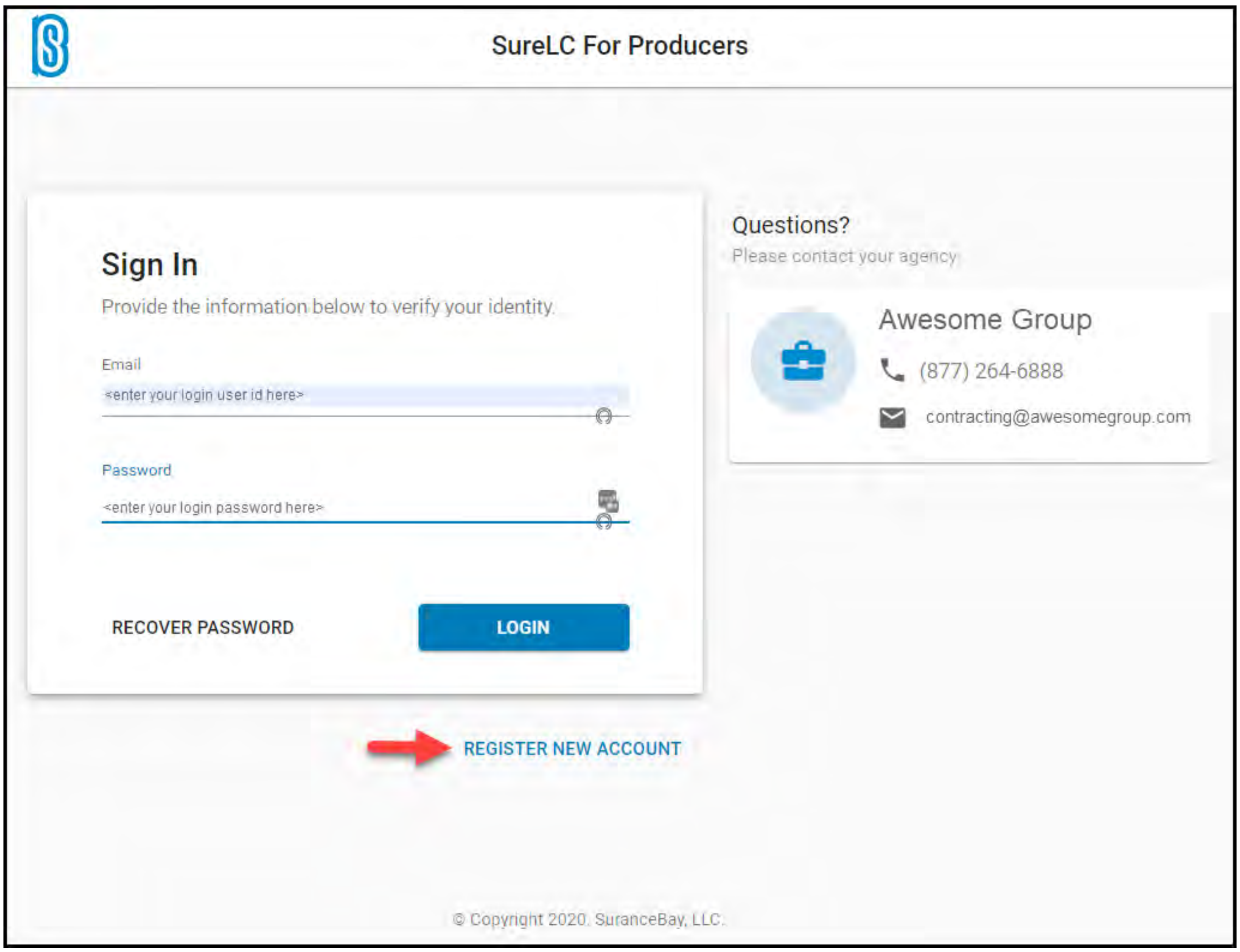
How to Login

Where is the SureLC Login?

In order to register or login to SureLC, you MUST use a specific login link for your agency licensing department. This link is typically made available either on their web site or will be sent directly to you by email.

If you don't have the link or you don't know the agency number to put in the link above, please contact your agency's licensing department. They will provide you with the correct link and instructions for new user registration & login.

Once you have access to the SureLC link, select it and you'll be brought to the following login page:



Once at the login page enter your User ID email and password to login, or you may select **Register New Account** to register yourself with the agency.

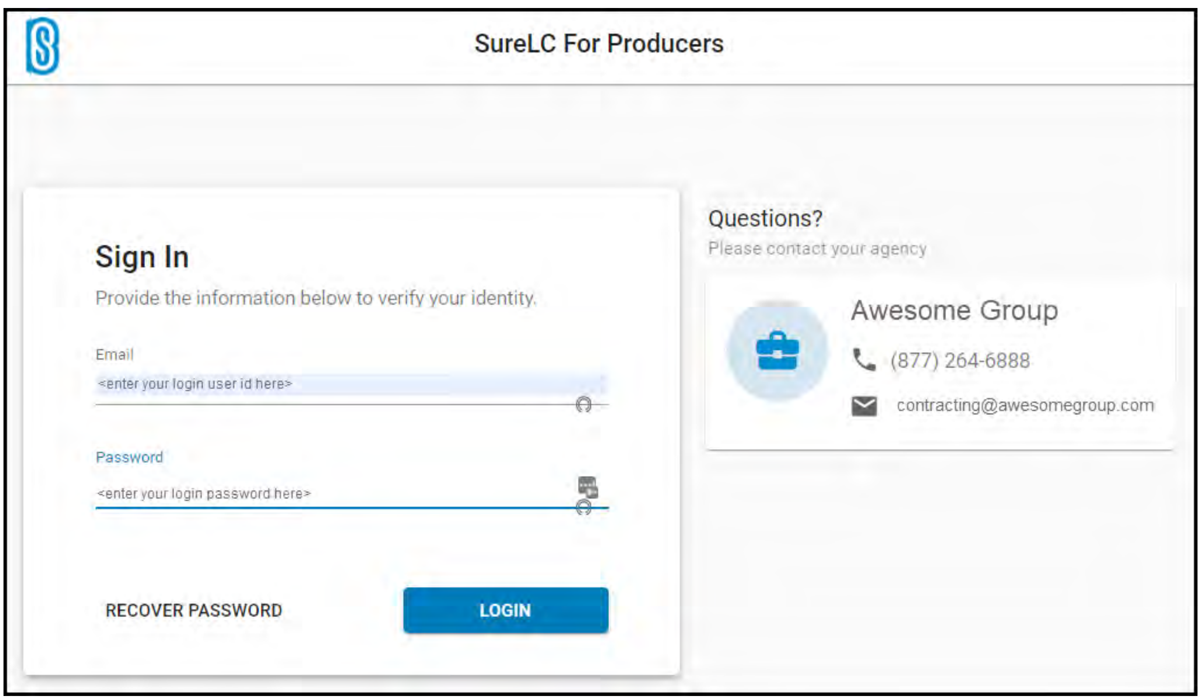
Multiple SureLC Logins

When registered with multiple agencies who use the SureLC platform it's important to understand the following:

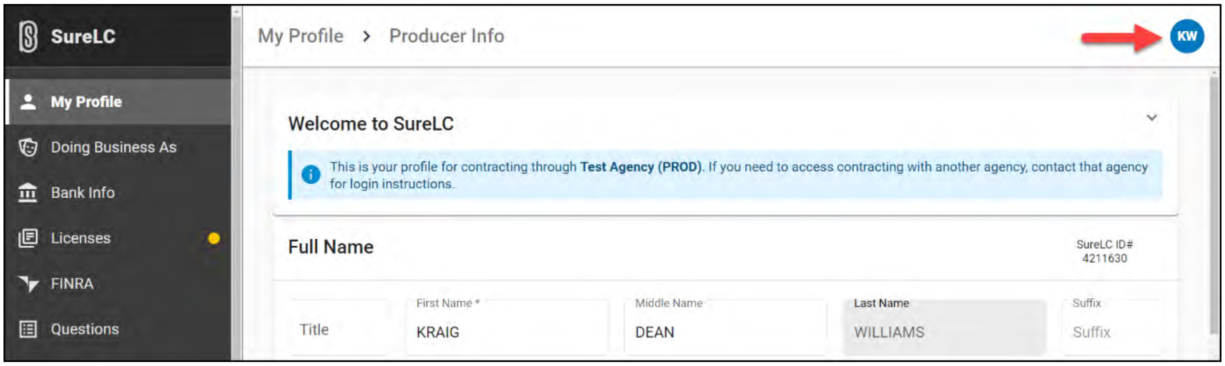
- Each agency will have their own dedicated SureLC web login page which will be used for registration and to log into your SureLC account under that agency.
    - For example, if you are registered with 3 agencies, you'll have 3 SureLC logins and a dedicated web page to log into for each agency.
- Your login credentials (User ID and password) MUST be unique for each agency.
    - Please note: The only exception to this rule is that when registering with additional agencies you can use the same login User ID email for each agency login, as long as the passwords are unique to each agency.
- ALL agency login web pages should be bookmarked and labeled to make future logins easier.

How to Change your Login User ID Email or Password

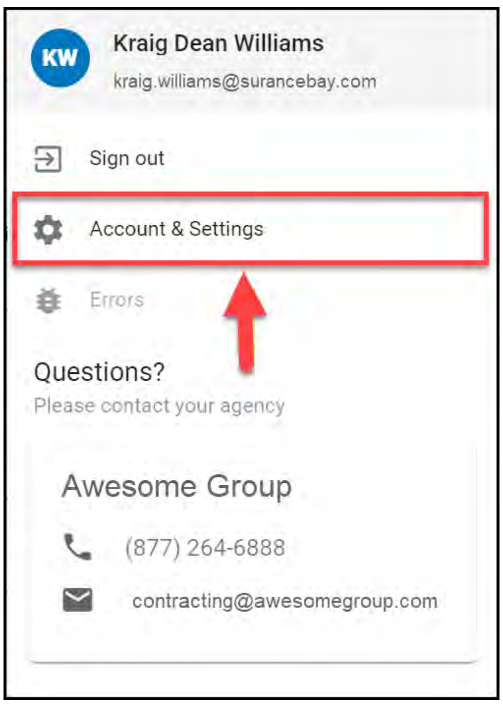
Step 1: If you need to change the User ID email used to access SureLC, you'll first need to login with your current User ID email. This will be the email address that you used when you registered with your agency.



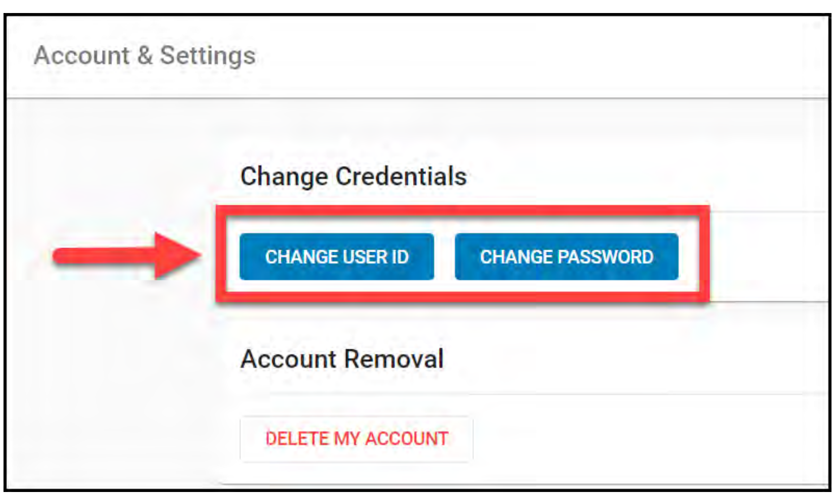
Step 2: Once logged into SureLC, click on your **initials icon** on the top right corner of the page. This will open the user options menu.



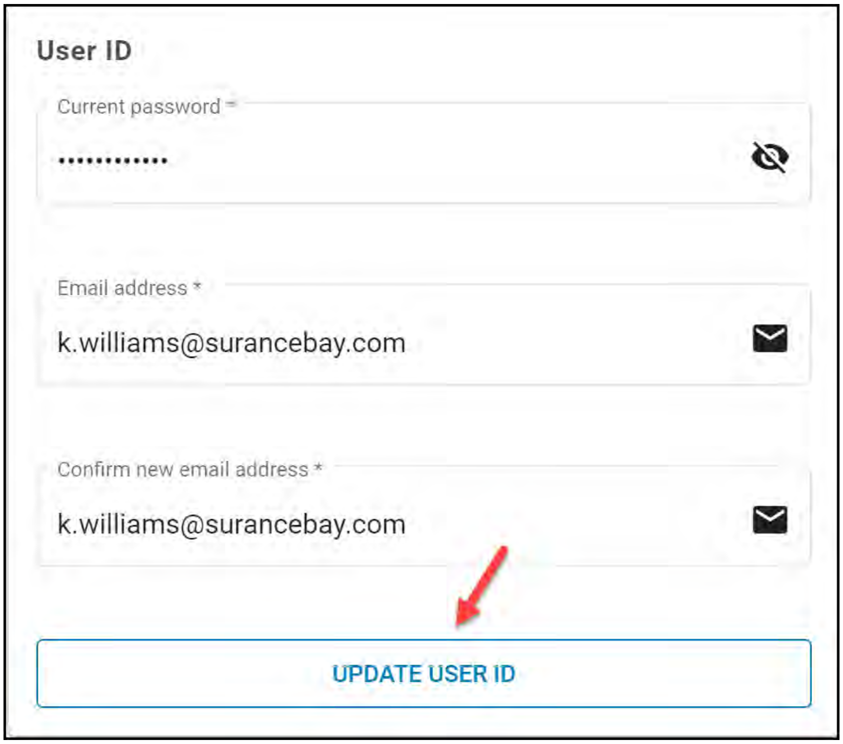
Step 3: Select **Accounts & Settings.**



Step 4: From the Account & Setting window you can change your login UserID, change your login password, or delete your SureLC account with the agency you are logged into.

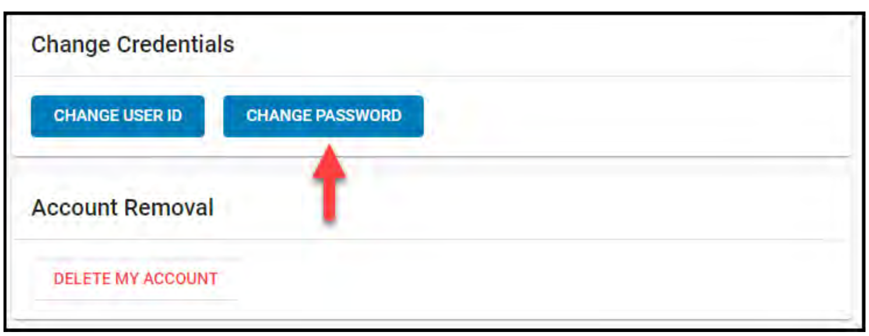


Step 5: To change your login User ID select the **Change User ID** button. Enter the current password for your SureLC account. Type in the new email address you want to change your SureLC login UserID email to. Enter it a 2nd time to confirm. Click **Update User ID** to save the changes. To change your login password skip to step 6.

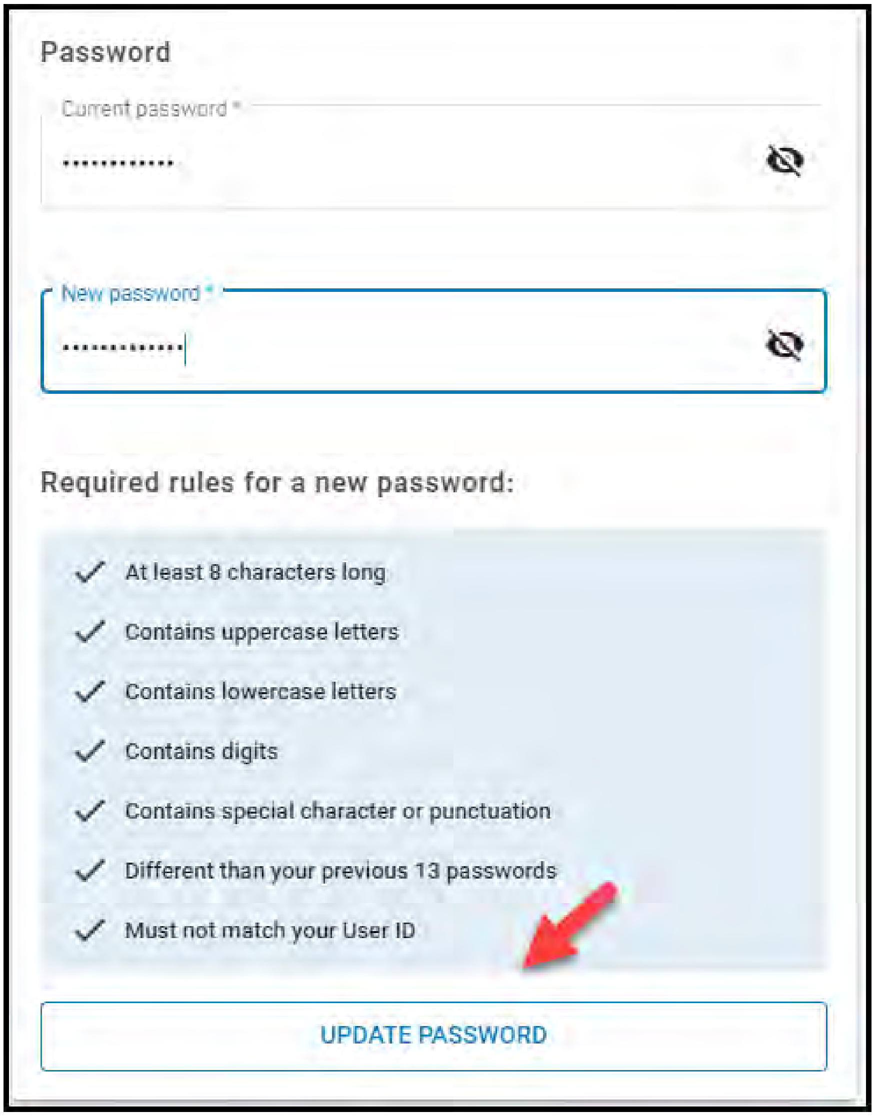


Please Note: Changing your login User ID email DOES NOT change the contact email listed in your My Profile or Doing Business As page. If you want to change the email addresses in your profile, you MUST go to each of these pages directly to change them.

Step 6: To change your login password click the **Change Password** button.

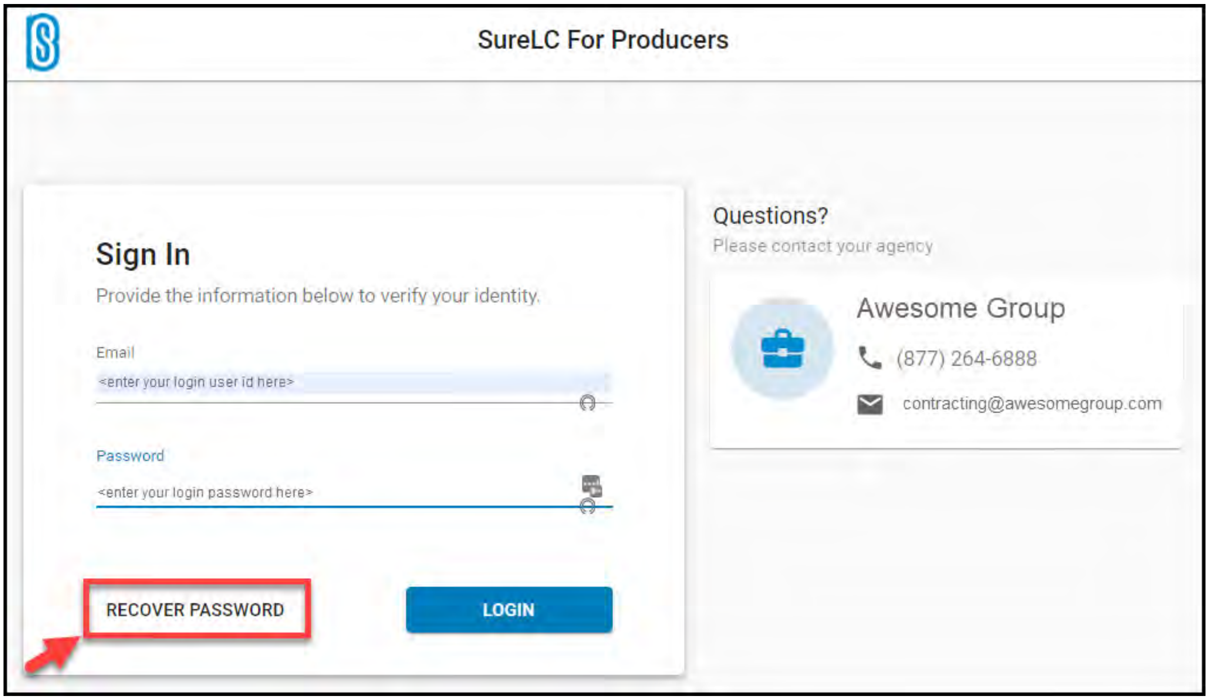


Enter your current password and then enter the new password. Follow the password creation rules listed below the field to ensure it's a strong password. Click **Update Password** to save the new password.

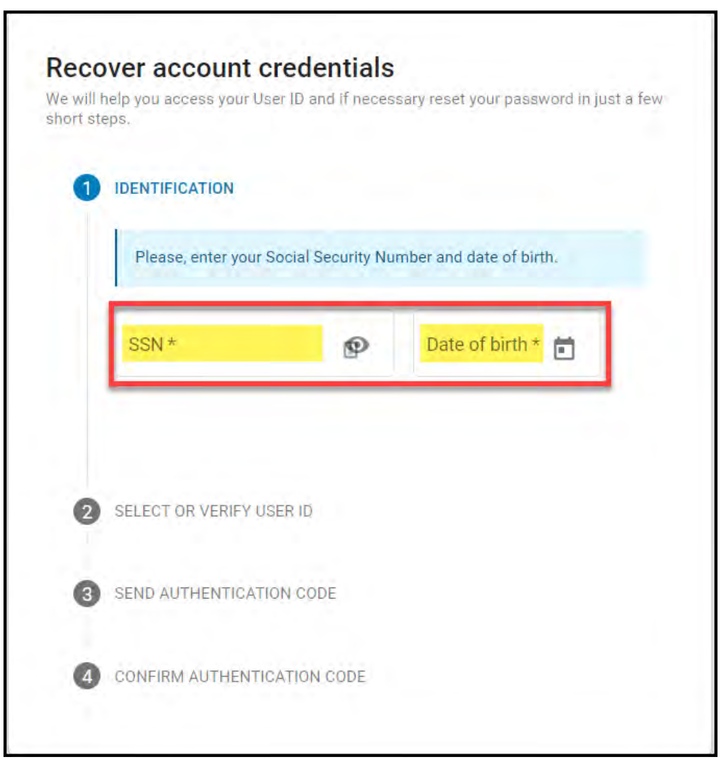


How to Recover your Account Credentials and Reset your Password

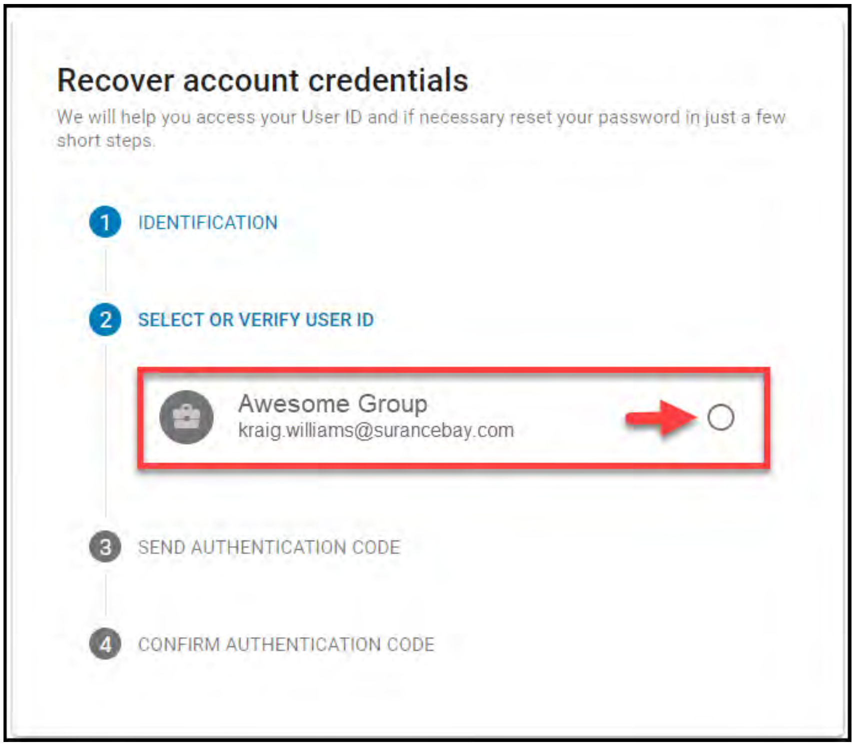
Step 1: From the SureLC login page select **Recover Password.**



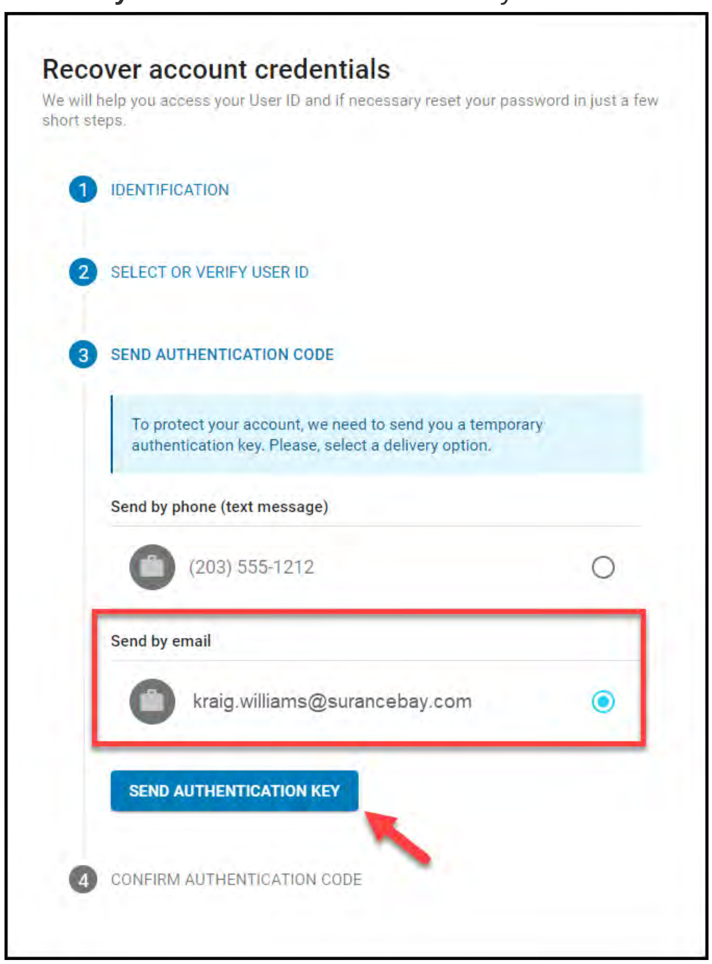
Step 2: Enter your **social security number** and **date of birth** to verify your login User ID. Continue with step 3 to reset your password.



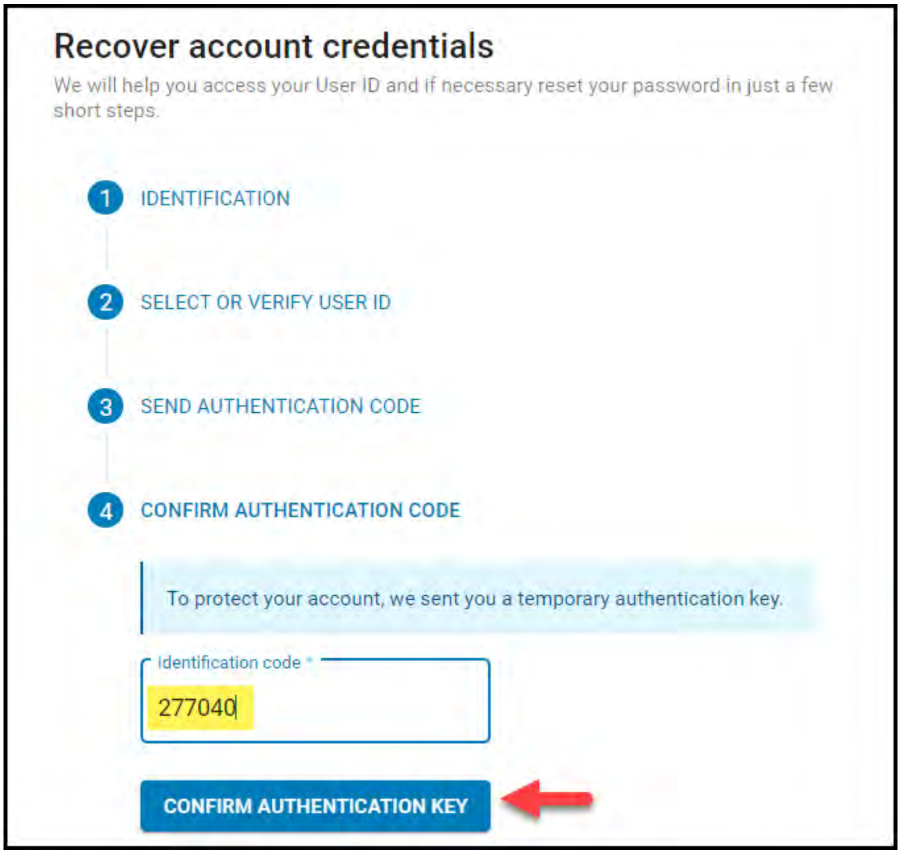
Step 3: Use the radio button and select the account you want to recover.



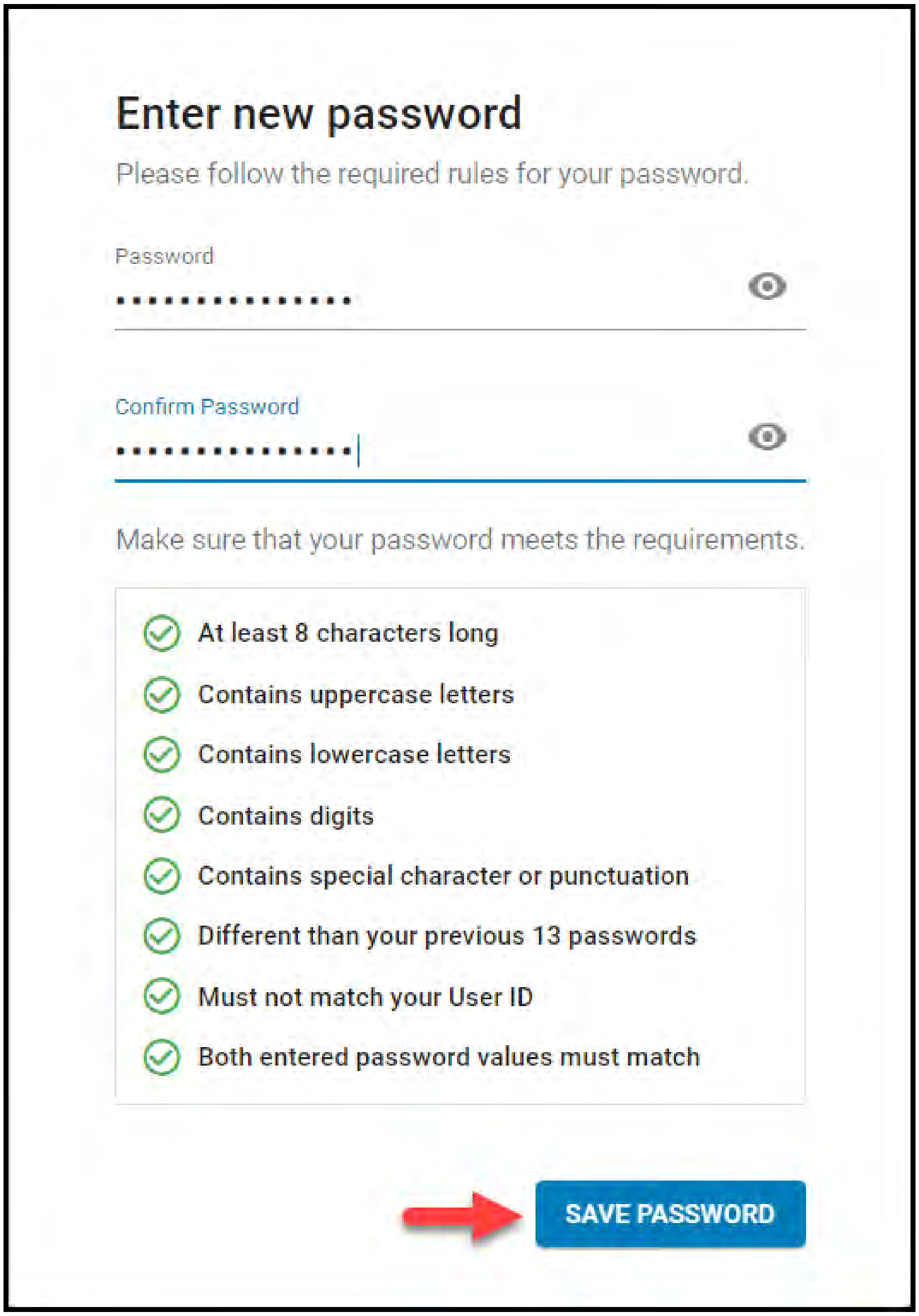
Step 4: For security choose the method to receive the authentication key. For this example, email was selected. Click **Send Authentication Key** receive the code via email. If you cannot find the email check your junk/spam folder.



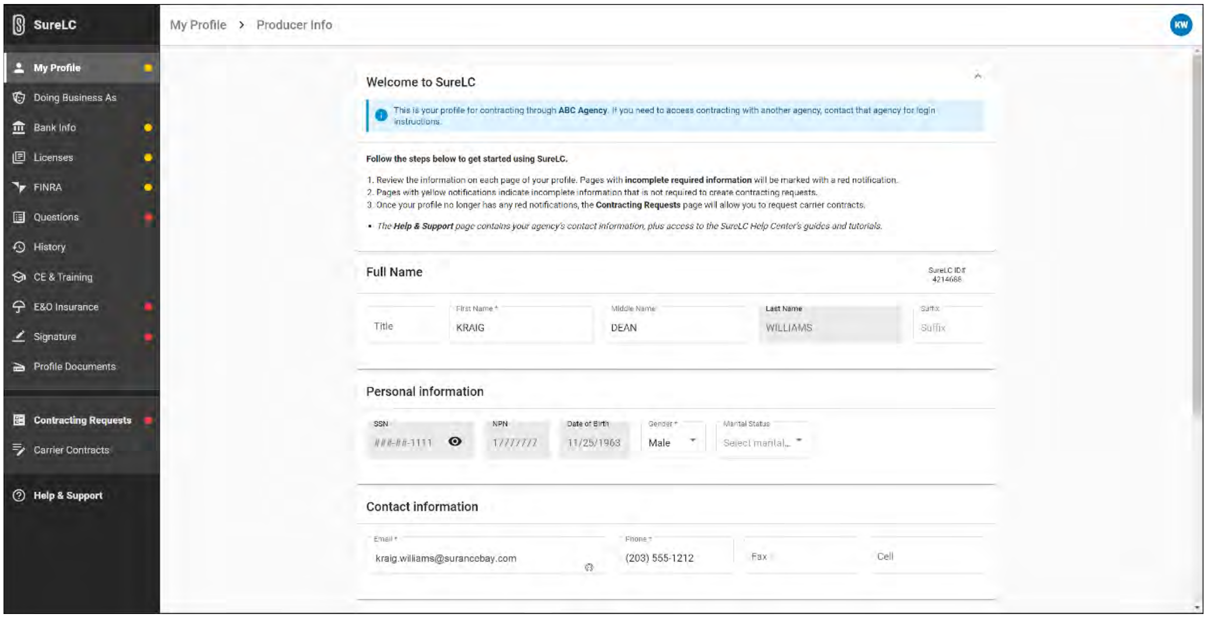
Step 5: Once the authentication code is received, enter the code in the field provided and then select **Confirm Authentication Code**.



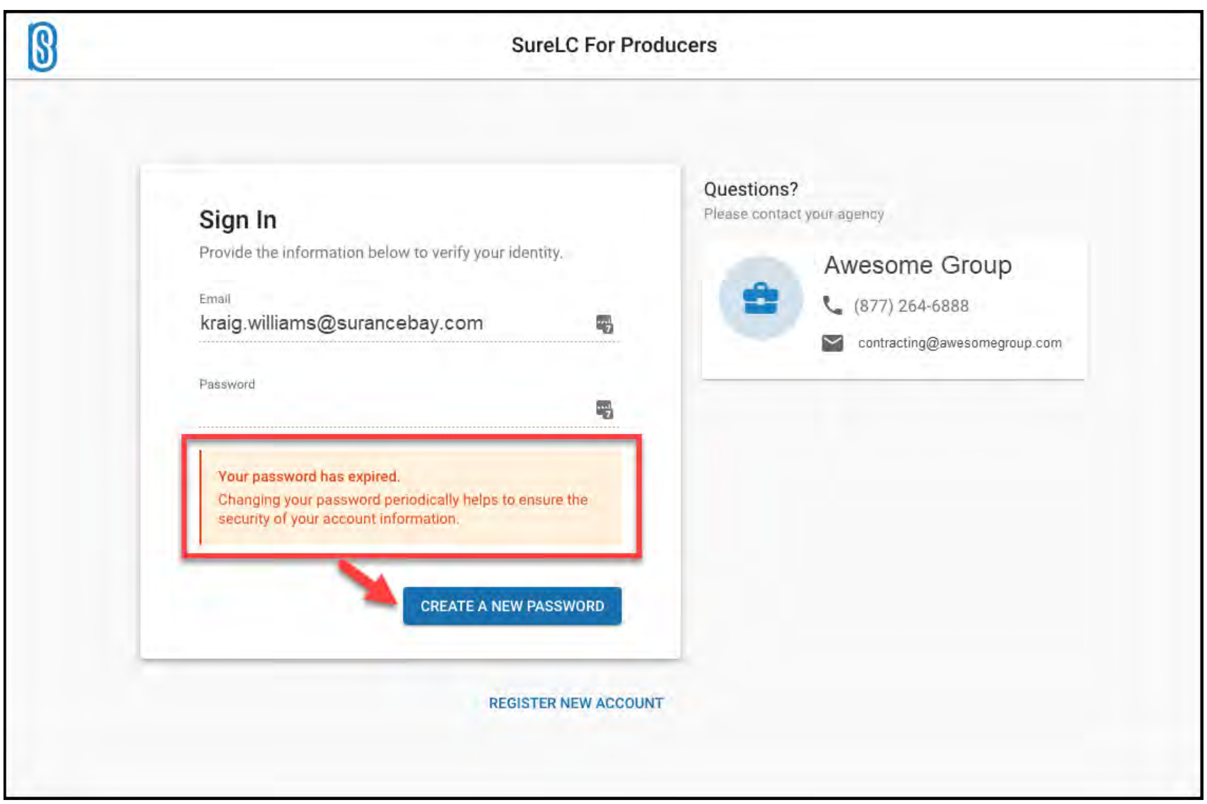
Step 6: Enter the new password in the field provided and then enter it a 2nd time to confirm it. Remember to follow the password rules when creating your new password. Click **Save Password** to update your account password.



Step 7: If you've done everything correctly your password will be updated, and you'll be logged into your SureLC account automatically.



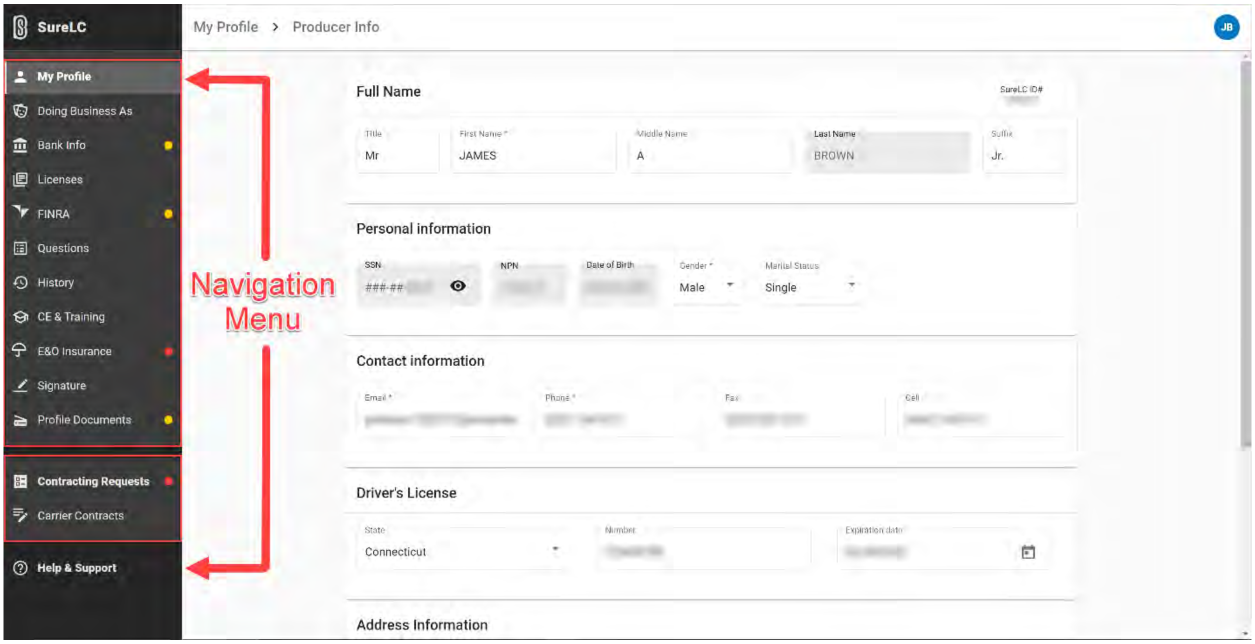
Please Note: As a security measure, producers MUST change their login password every 90 days. The software will prompt you to change your password when the 90-day limit is approaching or has passed.



3) SureLC Producer Profile Overview

This article provides an overview of the SureLC for Producers application. After logging in to the application, 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 creating a new carrier contracting requests.

Navigation Menu



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.

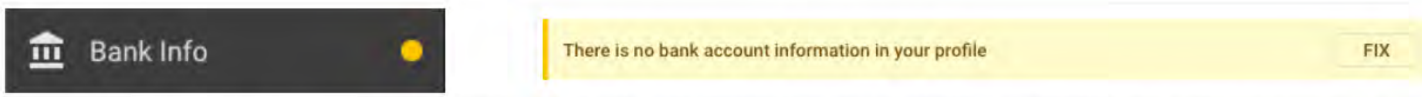
The **Contracting** section at the bottom of the menu is where producers can submit new contracting requests, check the status of outstanding requests, and view any existing carrier contracts. Please refer to the table below for more information about each page.

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	The **My Profile** page is the starting point when producers login to SureLC. The producer's last name, SSN, NPN, and DOB are imported directly from the producer's PDB report at NIPR and are not editable.
Doing Business As	The **Doing Business As** page is where the producer's DBA type is specified. This setting determines which forms are required for new carrier contracting requests and how producer commissions will be paid. Click Here for more information about the **Doing Business As** page.
Firm	The **Firm** page is only shown when the producer is doing business as a Business Entity. It shows the information for the Firm that is specified on the Doing Business As page.
Bank Info	The producer's banking information is added on the **Bank Info** page. Bank routing and account numbers MUST be added for producers who are doing business as Individuals and Business Entities. Please note for License-Only Agents (aka 'Solicitors') this page will not be shown.
Licenses	The **Licenses** page shows ALL of the producer's state licenses by status (Active or Inactive). Most of this information is imported from NIPR and updated on a regular basis. Producers may purchase or renew state licenses right from SureLC! Click Here for more info.
FINRA	The **FINRA** page is where a producer indicates if they are a registered representative with FINRA or not. If **Yes** then SureLC will attempt to automatically import their CRD#, Broker Dealer information, and other FINRA-related details such as State Registrations, Exams, Disclosures, etc.
Questions	The **Questions** page contains some of the most common background questions that carriers ask. Producers must answer ALL background questions before they will be able to submit any new carrier contract requests. Background questions and answers are included with ALL new carrier contract requests.
History	The **History** page is where producers can provide the last 7 years of employment and resident address history. Please note this information is optional.
CE & Training	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 & carriers. Click Here for more information on how to use this page.
E&O Insurance	The **E&O Insurance** page is where producers add their existing E&O policy information or purchase new E&O coverage.
Signature	The **Signature** page is where producers MUST review and sign the signature authorization form before they can create any new carrier contracting requests. Use this page to access the form and/or to create a digital signature on-screen.
Profile Documents	The **Profile Documents** page contains ALL the documents uploaded to the producer's 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 new carrier 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 completed through SureLC. Click Here for more details.
Help & Support	Visit the **Help & Support** page to see contact information for your agency and to access support 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.



Yellow dots/notices indicate which pages contain information that is necessary to submit contracting requests to the agency/carrier but will not prevent the producer from creating a request. Some of this information can be provided during the submission process.

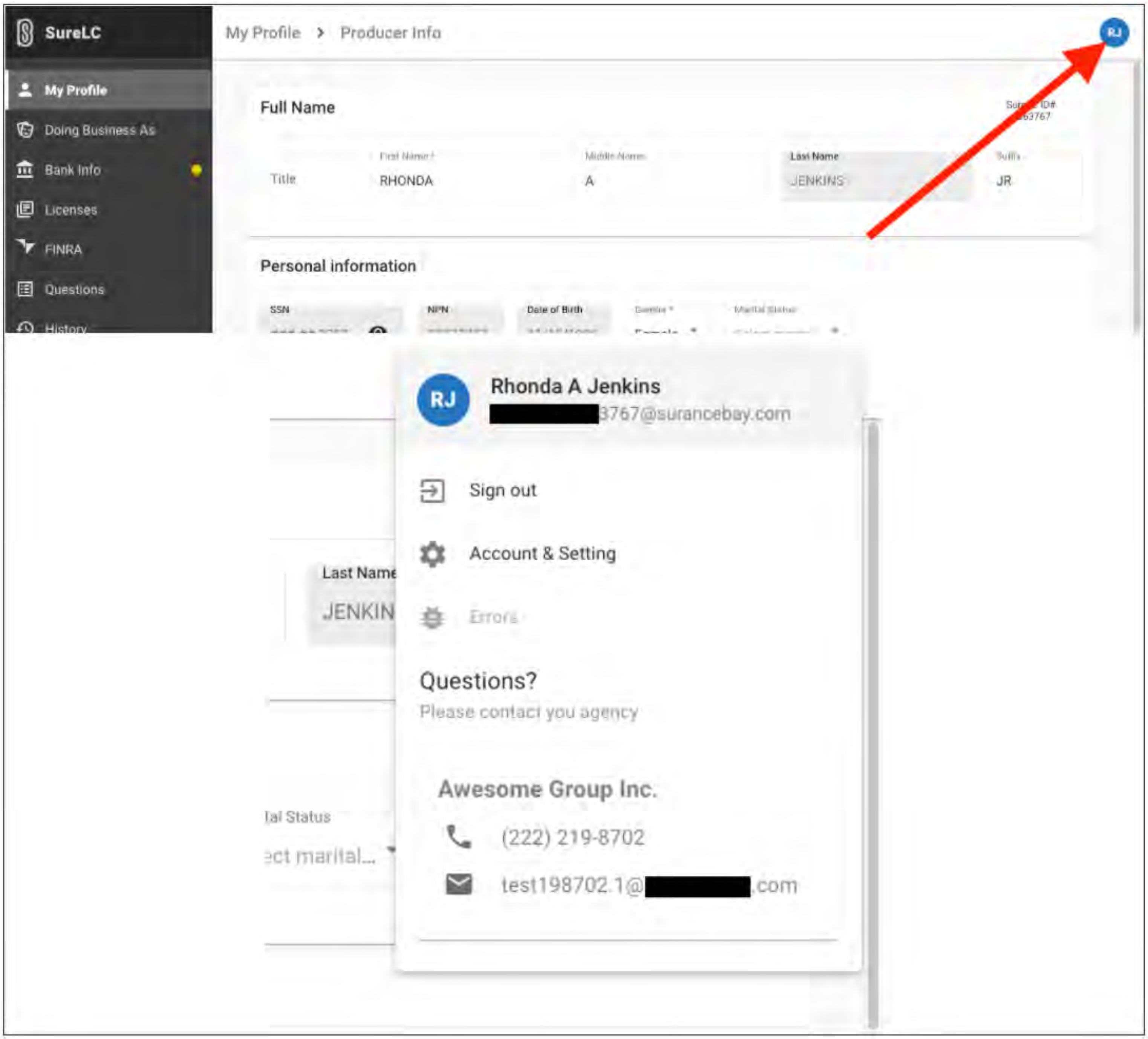
Red dots/notices indicate which pages are missing information that is required BEFORE the producer will be able to create a new contracting request.

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



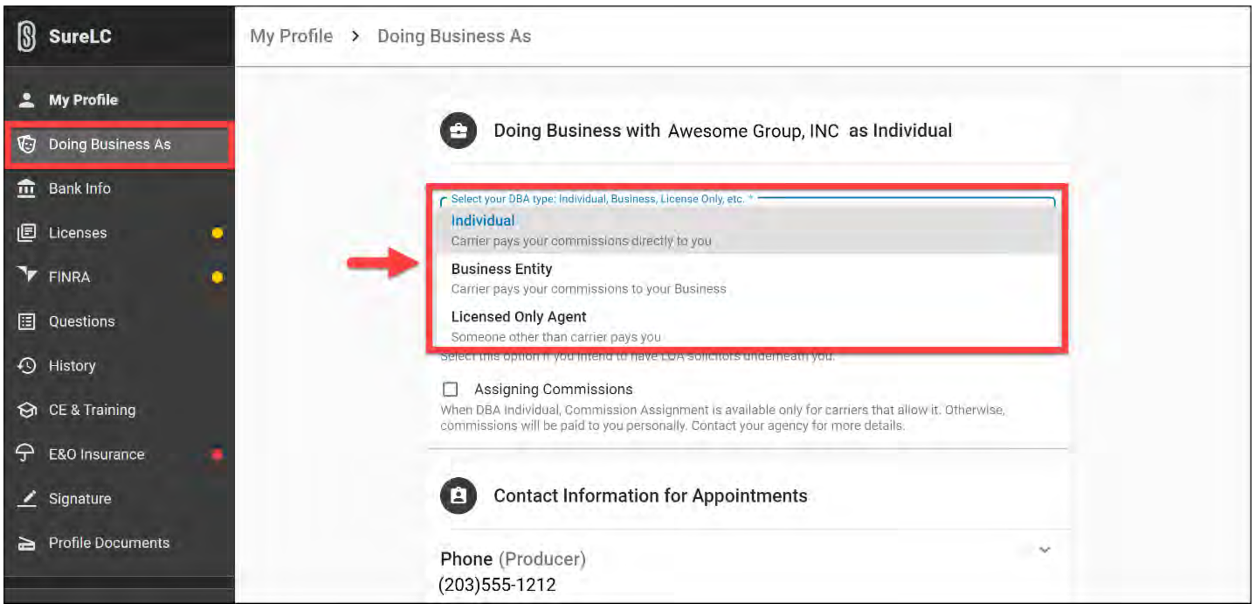
4) Producer Profile -> Doing Business As

This article describes how to use the **Doing Business As** page in SureLC. The DBA selection on this page will determine which carrier forms and questions are included in any contracting requests, and how commissions will be paid to the producer.

DBA Type

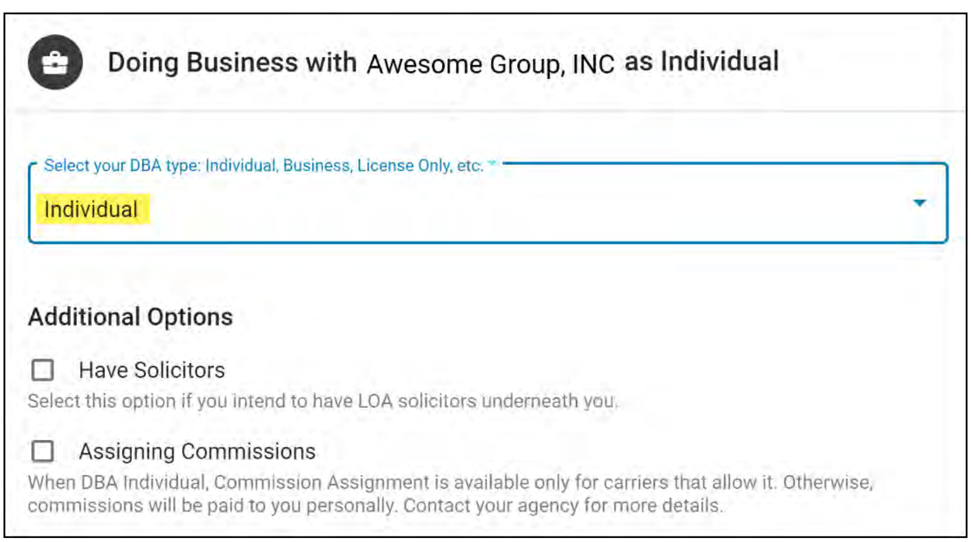
One of the following three options MUST be selected to complete the DBA setup:

- Individual
- Business Entity
- Licensed Only Agent



Individual

This option should be selected when when the producer will be paid commissions directly from the insurance company at the set commission rate. Producers will receive a 1099 with their SSN at the end of the year from the insurance company.



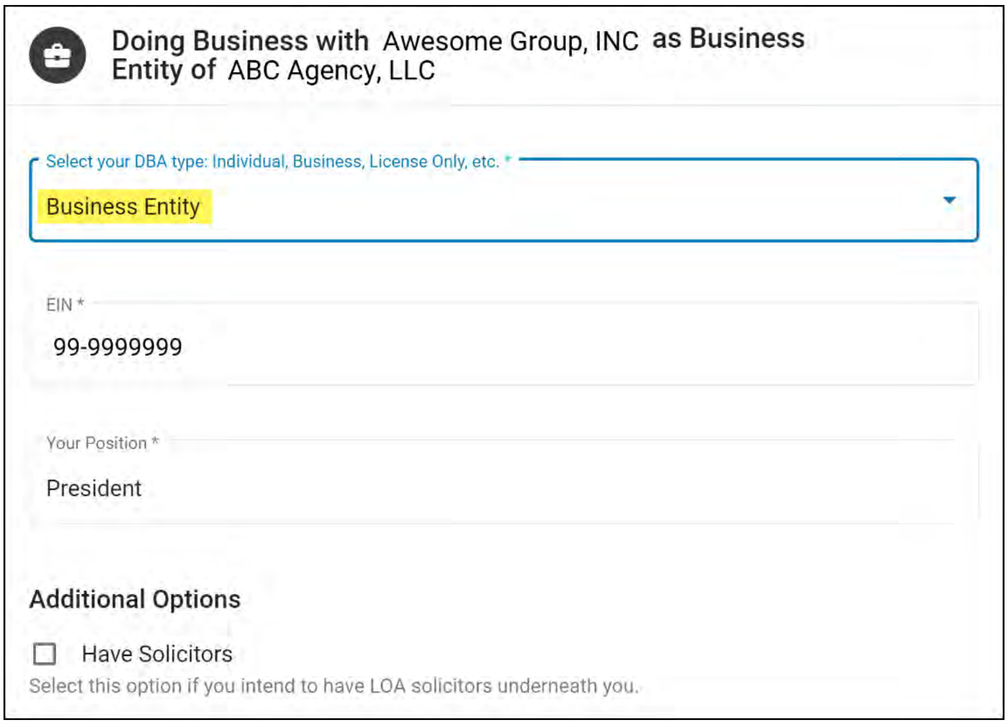
Additional Individual Options:

Have Solicitors - Select this check box when you'll have Licensed Only Agents soliciting for you.

Assigning Commissions - This setting is ONLY available when Doing Business As is set to Individual and ONLY for the carriers that allow it. Producers can select this check box when they want to assign their commissions to a beneficiary/business. After selecting this option, the tax id, name, and beneficiary address must be provided.

Business Entity

Select this option when the applicant is an owner or officer of a business entity that has an EIN (employer identification number) and commissions will be paid directly to the business entity.

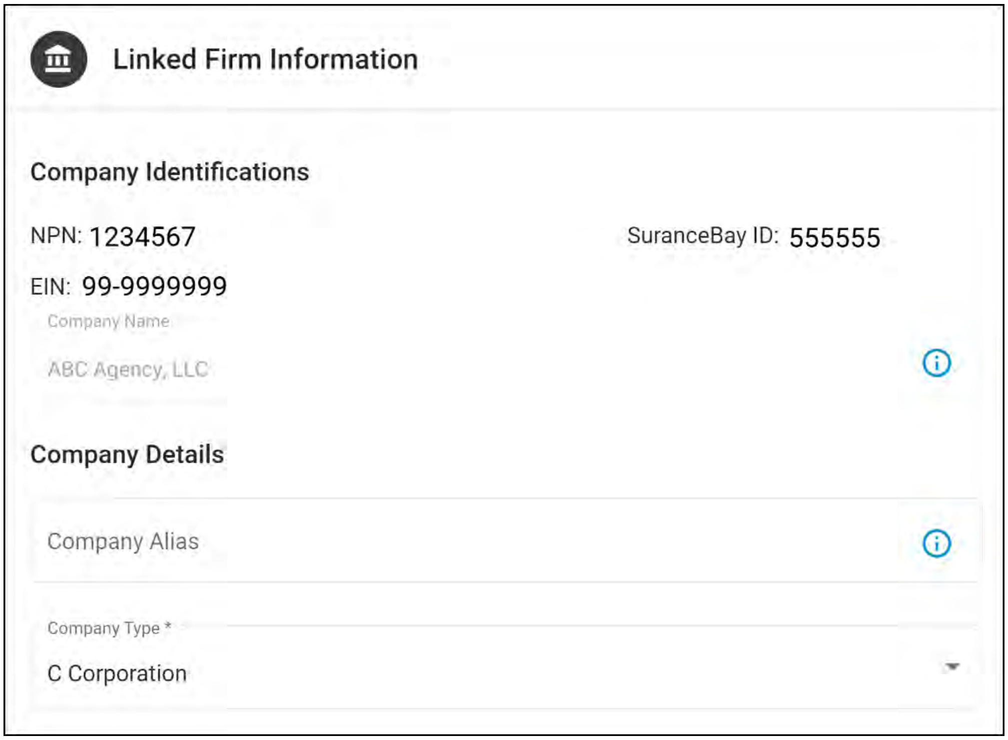


Additional Business Options:

Have Solicitors - Producers who will have Licensed Only Agents soliciting for their business should check this box to enable this option.

Linked Firm Information

After entering the EIN for the business and importing the business information from NIPR the firm information will be linked to the producer profile. Firm information will be shown here. Firm info is imported from NIPR and cannot be edited here.



Licensed Only Agent

Also referred to as "Solicitors". This option should be selected when producers are soliciting for another individual or business.

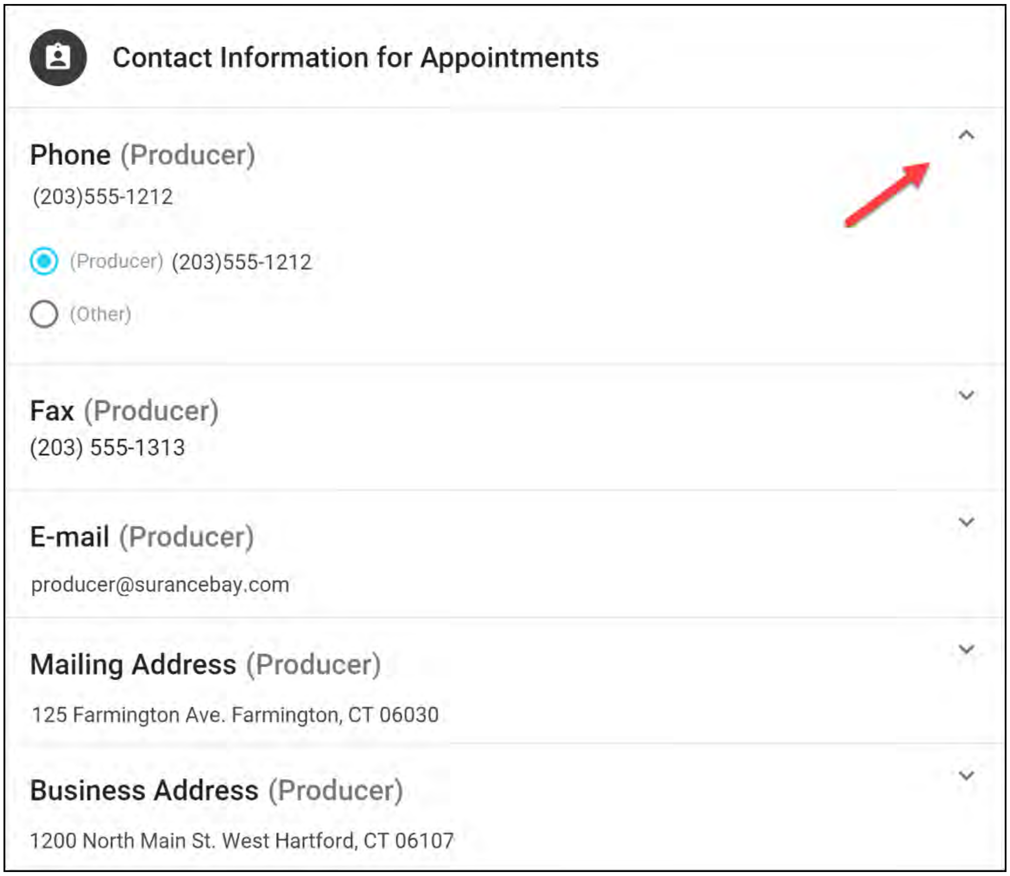
This selection is only for applicants who:

- Need to be appointed by a carrier
- Do not receive commissions directly from the carrier
- Are not an owner or officer of a business entity

Contact Information for Appointments

No matter what DBA type is selected, contact information should always be reviewed to make sure it's current as this information will be included on the contracting paperwork. By default, this information is pulled from the **My Profile** page. However, if the producer works with multiple agencies in SureLC and has specific contact information they'd like to use for one agency's contract requests they can enter that information here and it will not affect the contact information used by the other agencies.

Select the arrow to expand any of the sections in order to modify the contact info.



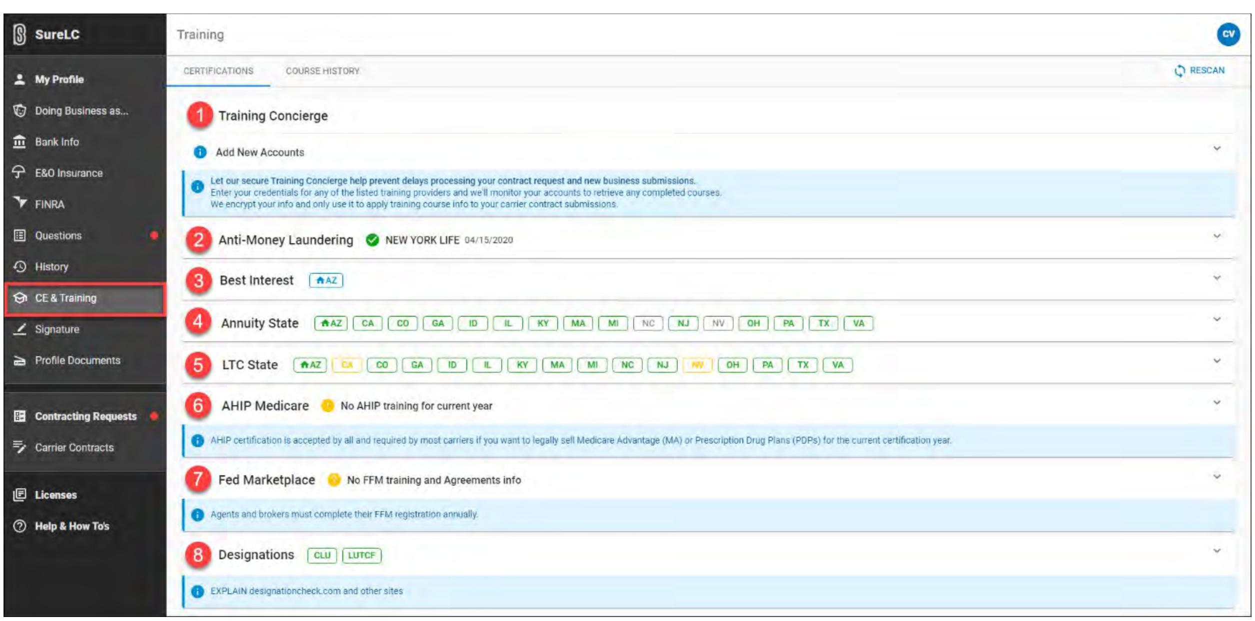
5) Producer Profile -> CE & Training

This article describes how producers can use the **CE & Training** page to provide proof of current training certifications and any designations they hold. Training certifications that can be added here include Anti-Money Laundering, Best Interest, Annuity and Long-Term Care state product training, AHIP Medicare, and Federally Facilitated Marketplace (FFM) training.

This page contains two tabs: **Certifications** and **Course History**. Use the Certifications tab to add and view current training certifications. The course history tab shows all the producer's training courses added or retrieved from various providers.

Certifications Tab

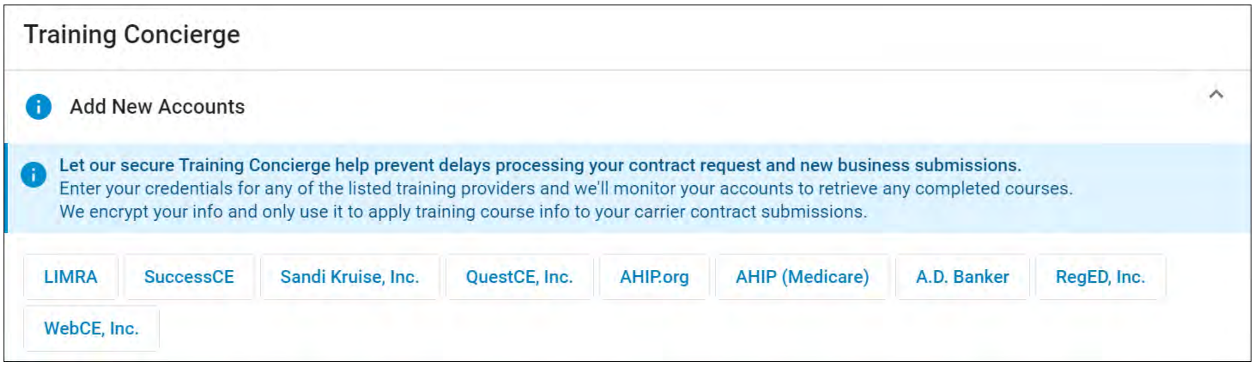
This section shows all the producer's most recent training certifications according to the records added directly or retrieved automatically from various training providers. This section is made up of the following 8 sections.



1. Training Concierge

Enter your training provider login credentials in the **Training Concierge** to have SureLC actively monitor your training provider accounts and retrieve your completed training course information directly from their websites. This makes it easy to keep your information up to date automatically.

Note: Your login credentials are encrypted and stored securely. This information is ONLY used to retrieve your training information for the purpose of contracting with insurance carriers.

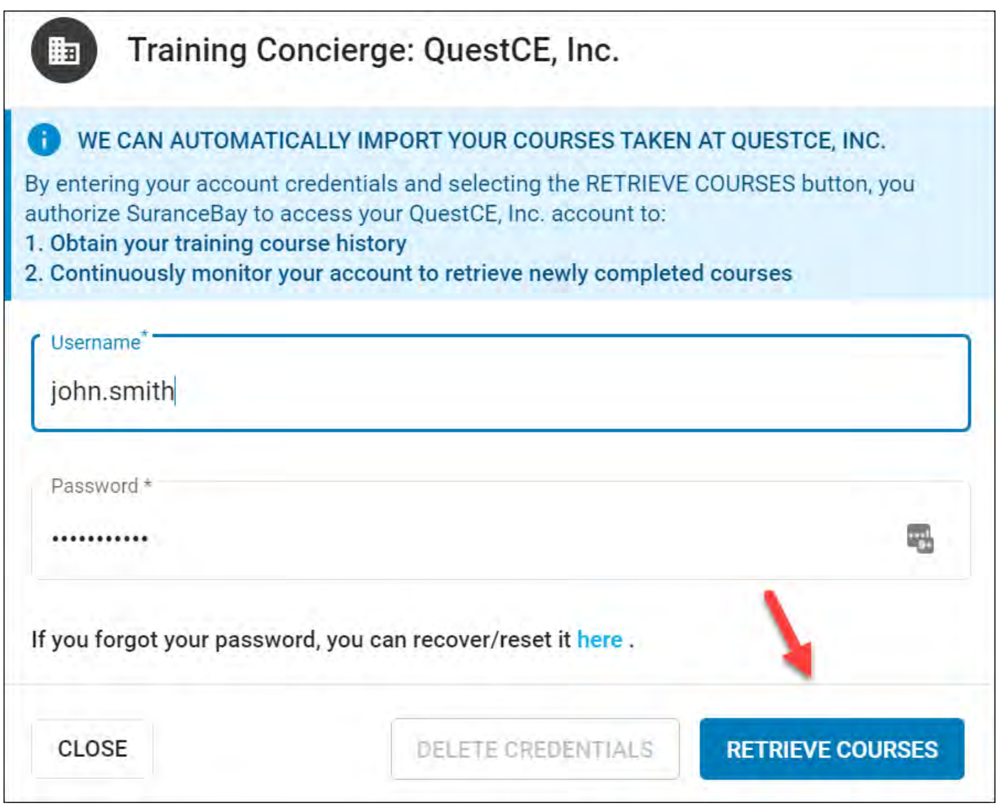


<u>**How to use the Training Concierge:**</u>

Step 1: Select the name of the training provider. In the following example "QuestCE, Inc." was selected.

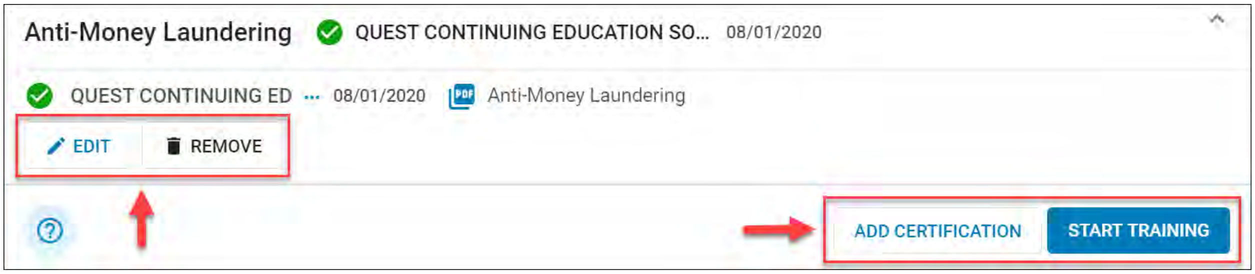
Step 2: Read the terms and then enter your username and password for the training provider's web site.

Step 3: Select "Retrieve Courses" to have SureLC automatically import your training information. Once imported, SureLC will continue to actively monitor and import any new training courses completed through that provider.



2. Anti-Money Laundering

This section shows the producer's most recent AML training. When AML training is required for new carrier contract requests, producers MUST provide proof they have met this requirement by specifying the AML training they completed most recently. In the following example, the producer has provided AML certification information received from Quest CE completed on 8/1/2020.



Edit - Use the edit button to modify existing AML training information such as the provider name, course name, and completion date.

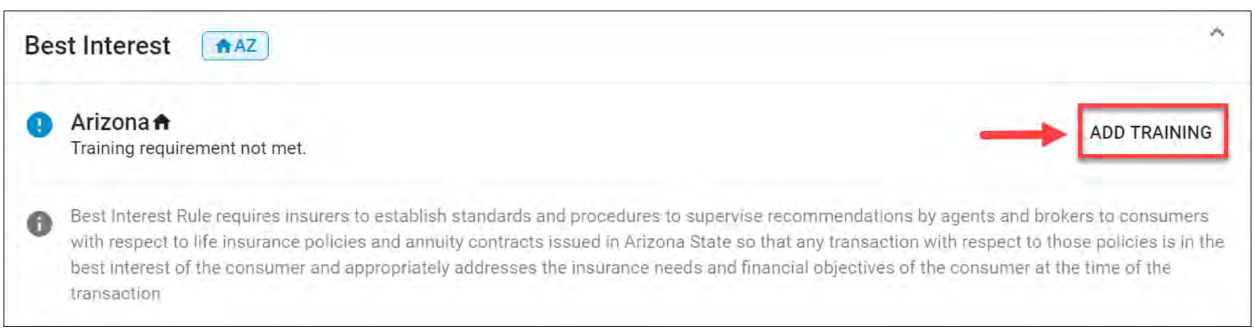
Remove - Use the remove button to delete the selected training course.

Add Certification - Select to add AML training information.

Start Training - Click to complete AML training with various course providers, including SuranceBay!

3. Best Interest

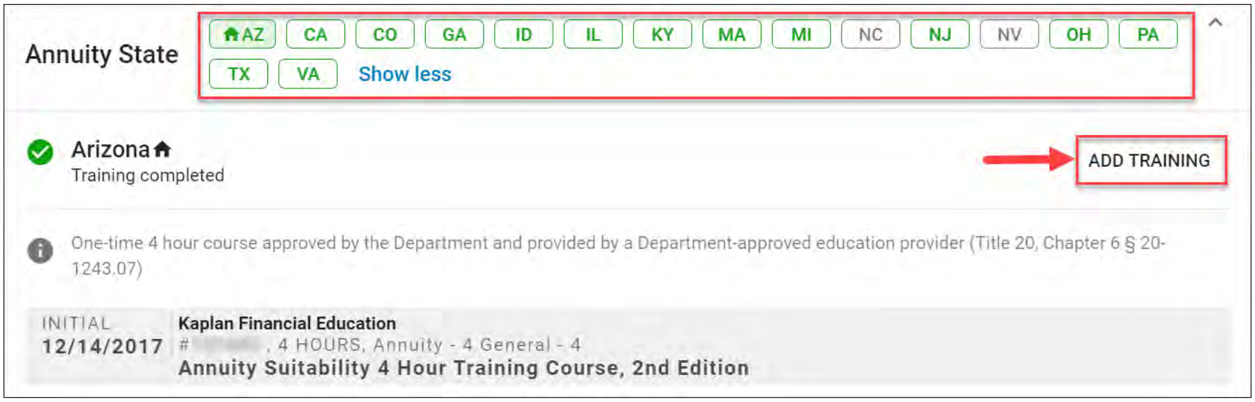
Best Interest training is required in certain states for producers who want to sell annuity products. This section allows producers to provide proof of current Best Interest training in those states.



Add Training - Select to add any current Best Interest training certifications not already displayed.

4. Annuity State

Annuity State product training is required in certain states for producers who want to sell annuity products. This section allows producers to provide proof of current annuity state product training in those states. In this example, the producer is licensed in ALL of the states listed below.



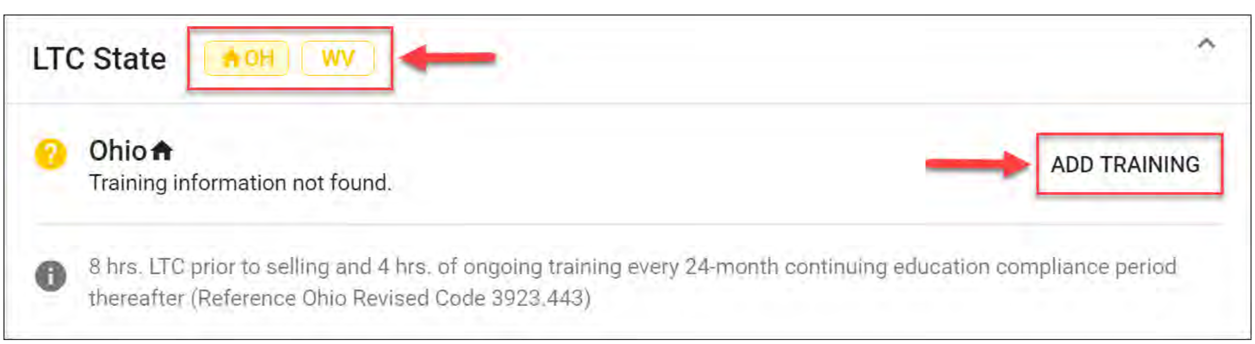
State Icons - Select any state icon for more information about the annuity product training requirement in that state. A green state indicates the training requirement has been met. A grey state indicates product training is not required in that state (i.e. NC/NV). A yellow state indicates the product training requirements have not been satisfied in that state.

Reciprocity - Some state product training certifications automatically cover additional states. In the following example, Arizona annuity product training automatically covers MA which is indicated by the following message.

Add Training - Select to add any current annuity state product training certifications not already displayed.

5. LTC State

Long Term Care (LTC) State product training is required in certain states for producers who want to sell LTC products. This section allows producers to provide proof of current LTC state product training in those states.



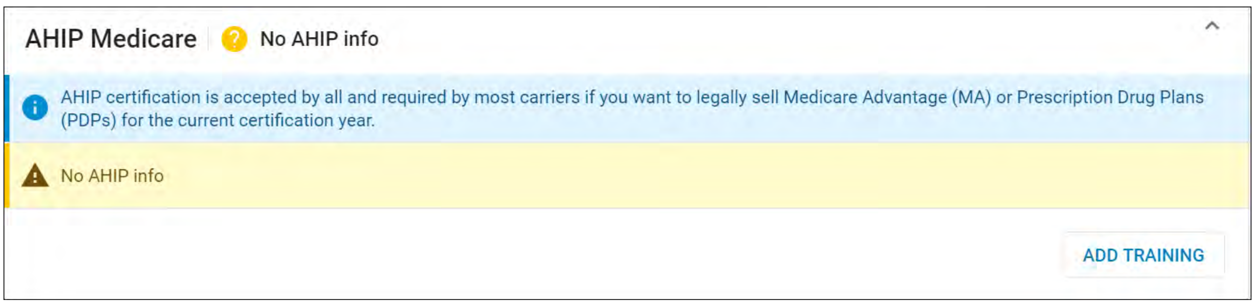
State Icons - Select any state icon for more information about the LTC product training requirement in that state. A green state indicates the training requirement has been met. A grey state indicates product training is not required in that state. A yellow state indicates the LTC product training requirements have not been satisfied in that state.

Reciprocity - Some state product training certifications automatically cover additional states.

Add Training - Select to add any current LTC state product training certifications not already displayed..

6. AHIP Medicare

AHIP Medicare certification is required when producers want to sell Medicare products. In the following example, the producer does not have AHIP Medicare certification.



Add Training- Select to add any AHIP Medicare training certifications not already displayed.

7. Fed Marketplace

This section is used to manually add Federally Facilitated Marketplace training information. Click the "Add Training" button to add and upload proof of your FFM training course and details.

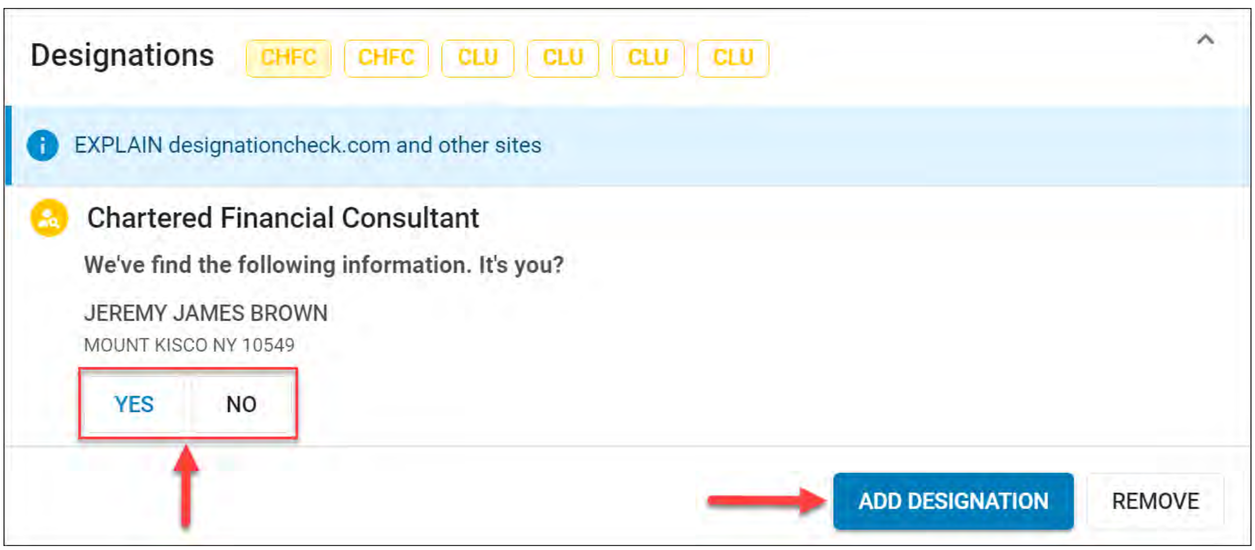
Add Training- Select to add any Fed Marketplace training certifications not already displayed.

8. Designations

This section is used to add or confirm any professional designations producers may hold.

Select the arrow on the top right for more information and options.

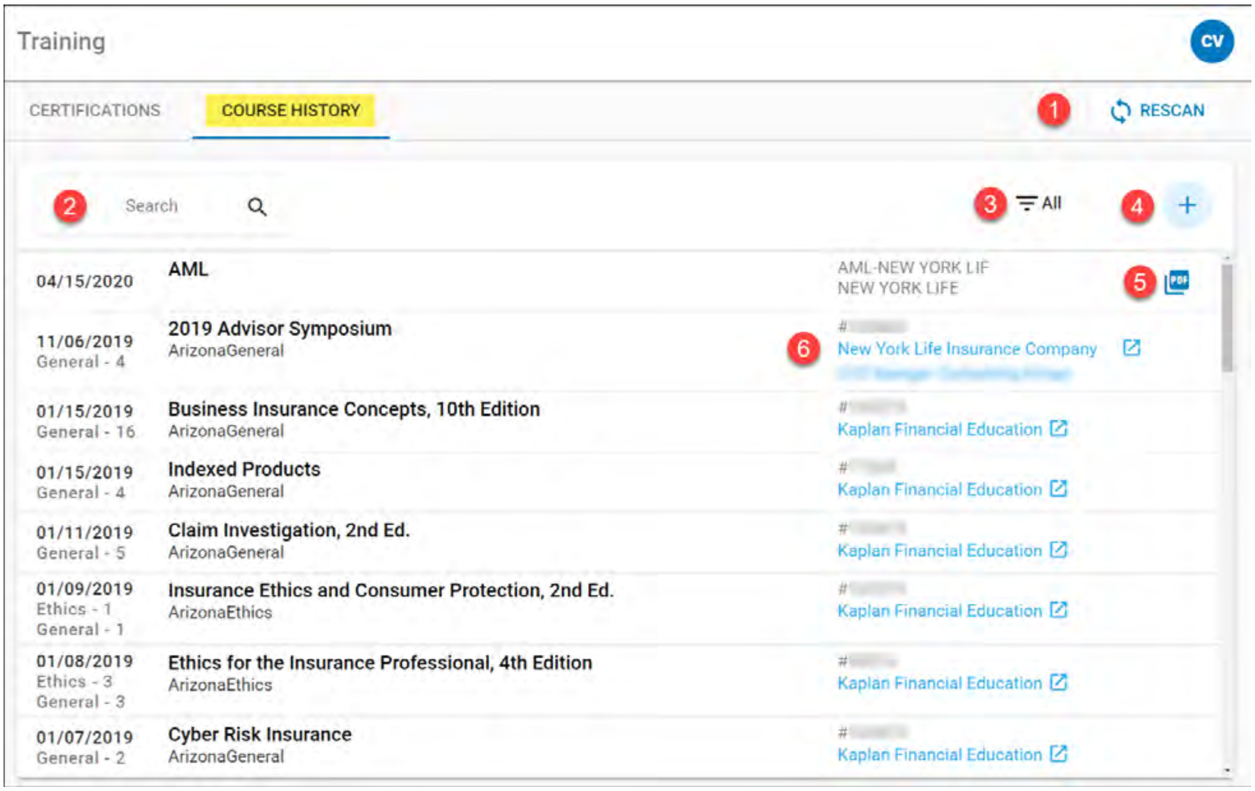
SureLC automatically searches designationcheck.com for the producer's name and adds any possible matching results to the list of possible designations, displayed in yellow. Select each designation icon to see more information about that possible designation and to confirm whether it is a correct match. Select **Yes** to confirm the designation is correct or **No** to remove the incorrect designation.



Click **Add Designation** to add any professional designations not already displayed.

Course History Tab

Select the Course History tab to view all courses that have been added or retrieved for the producer. Courses are listed from newest to oldest.



<u>**From the course history screen users can:**</u>

1. Rescan - Use to check for updates from public sources such as Sircon and State-Based Systems (SBS). Training information is retrieved from these sites automatically.

2. Search - Locate courses by name.

3. Filter - Use the funnel icon to resort the list by course type.

4. Add - Select to add training courses not already listed.

5. PDF Icon - Select to view the certification document.

6. Source link - Select the link to open the website from where the information was retrieved.

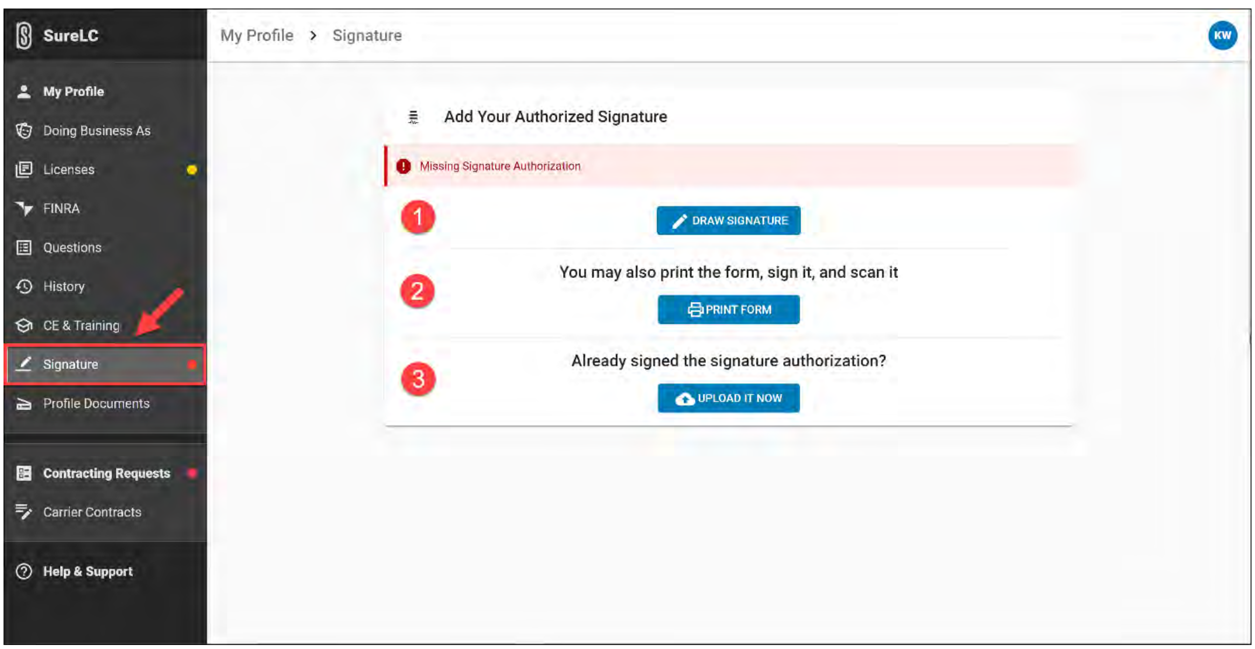
6) Producer Profile -> Signature

This article explains how to use the "Signature" page within the producer SureLC profile. Producers can access this page by selecting **Signature** in the navigation menu after logging into their SureLC account. The purpose of the Signature page is to provide access to SuranceBay's signature authorization form which MUST be reviewed and signed before producers will be able to submit new carrier contract requests via SureLC. Using this page producers can perform the following tasks:

1. DRAW SIGNATURE - Choose this option when you don't have access to a printer or scanner and want to review the signature authorization form on screen. Once reviewed, terms can be accepted and then a digital signature can be created on-screen via mouse or drawn when using a mobile device or tablet.

2. PRINT FORM - Choose this option when you want to print and wet sign the signature authorization form. Once signed, the form will need to be scanned and then the file uploaded to SureLC. Please note this option is not available when using a smart phone or tablet.

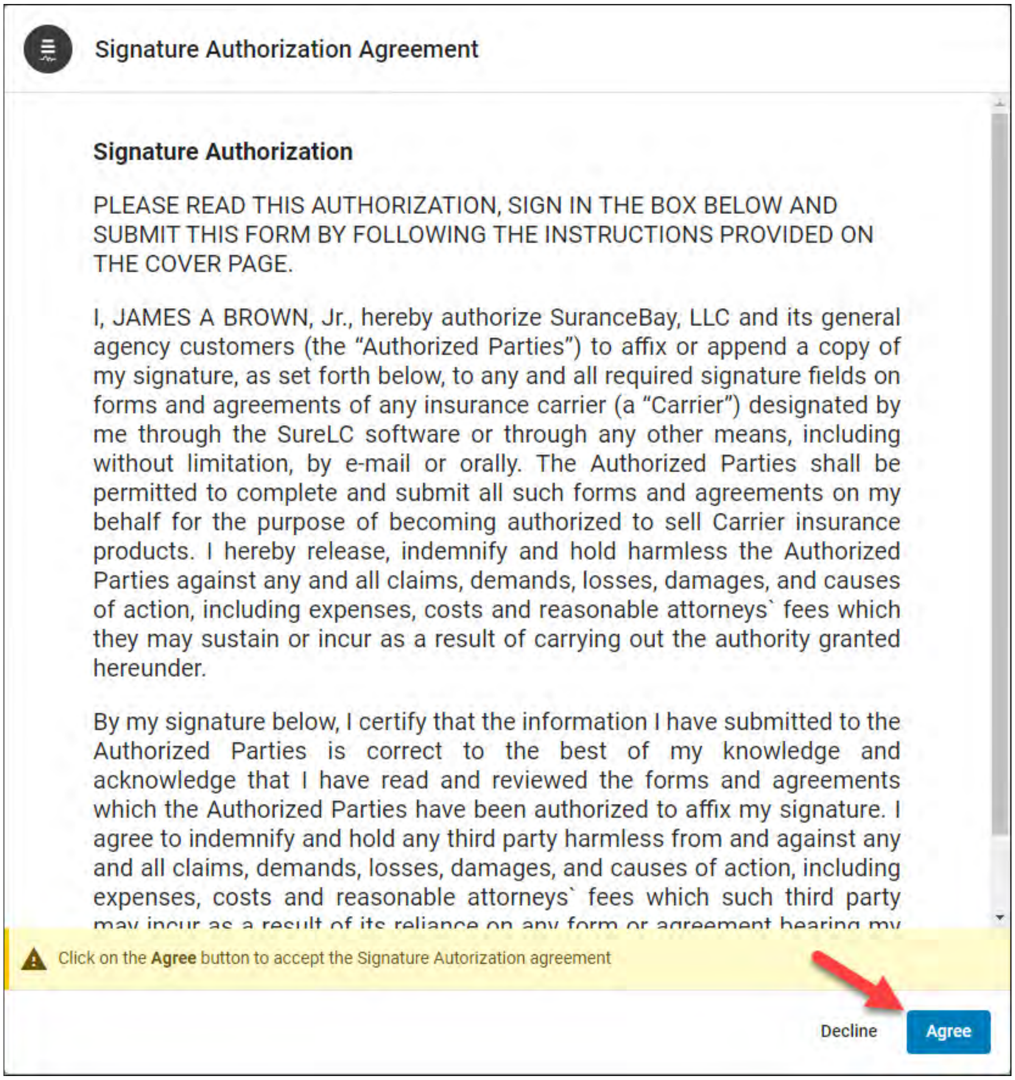
3. UPLOAD IT NOW - Select to open the file selector and upload a copy of the signed signature authorization form. SureLC will use onscreen character recognition (OCR) to create the digital signature using the uploaded form.



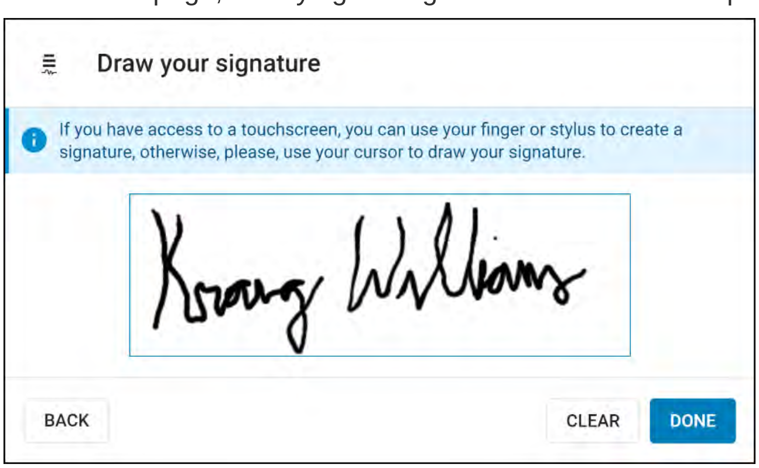
How to Create your Digital Signature Onscreen:

Step 1: Select the **DRAW SIGNATURE** button.

Step 2: Review the signature authorization form on-screen and accept the terms by selecting the **Agree** button.



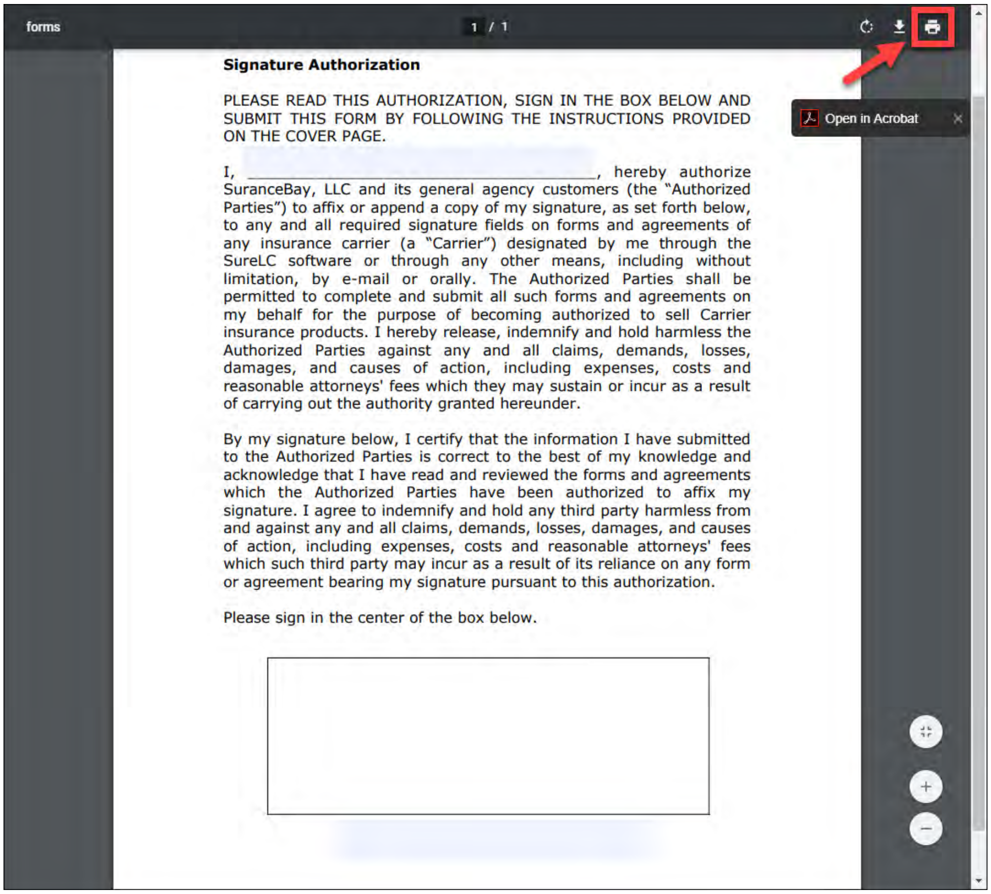
Step 3: Use your mouse (or touch screen if using a smartphone) to draw your signature on-screen. Use the **Clear** button to erase and try again if needed. When you're satisfied with the signature select the **Done** button. The signature authorization form will be saved and added to the Profile Documents page, satisfying the signature authorization requirement.



How to Print the Signature Authorization Form

Step 1: Select the **PRINT FORM** button.

Step 2: After the signature authorization form opens select the **printer icon** in your browser to print the form.



Signature Authorization

PLEASE READ THIS AUTHORIZATION, SIGN IN THE BOX BELOW AND SUBMIT THIS FORM BY FOLLOWING THE INSTRUCTIONS PROVIDED ON THE COVER PAGE.

I, ______________________________, hereby authorize SuranceBay, LLC and its general agency customers (the "Authorized Parties") to affix or append a copy of my signature, as set forth below, to any and all required signature fields on forms and agreements of any insurance carrier (a "Carrier") designated by me through the SureLC software or through any other means, including without limitation, by e-mail or orally. The Authorized Parties shall be permitted to complete and submit all such forms and agreements on my behalf for the purpose of becoming authorized to sell Carrier insurance products. I hereby release, indemnify and hold harmless the Authorized Parties against any and all claims, demands, losses, damages, and causes of action, including expenses, costs and reasonable attorneys' fees which they may sustain or incur as a result of carrying out the authority granted hereunder.

By my signature below, I certify that the information I have submitted to the Authorized Parties is correct to the best of my knowledge and acknowledge that I have read and reviewed the forms and agreements which the Authorized Parties have been authorized to affix my signature. I agree to indemnify and hold any third party harmless from and against any and all claims, demands, losses, damages, and causes of action, including expenses, costs and reasonable attorneys' fees which such third party may incur as a result of its reliance on any form or agreement bearing my signature pursuant to this authorization.

Please sign in the center of the box below.

Step 3: Review and sign the signature authorization form. Once signed the form will need to be scanned to create a digital copy or you can choose to take a photo instead to create a file.

How to Upload a Scanned/Signed Signature Authorization Form

Step 1: Select the **UPLOAD IT NOW** button.

Step 2: Use the file selector to locate the scanned/image file, and then open the file.

Step 3: Wait for the file to be uploaded and scanned with OCR (optical character recognition). Once scanned the signature image will be cropped and displayed. From here you can:

- **Crop Again** - Re-crop the signature image.
- **Enhance** - Darken the signature image.
- **Confirm** - When satisfied with the signature image select this button to save it.
- **Discard** - Delete the signature image.

Confirming the signature image satisfies the signature authorization requirement. The signature authorization form will be saved to the Profile Documents page as an Active document.

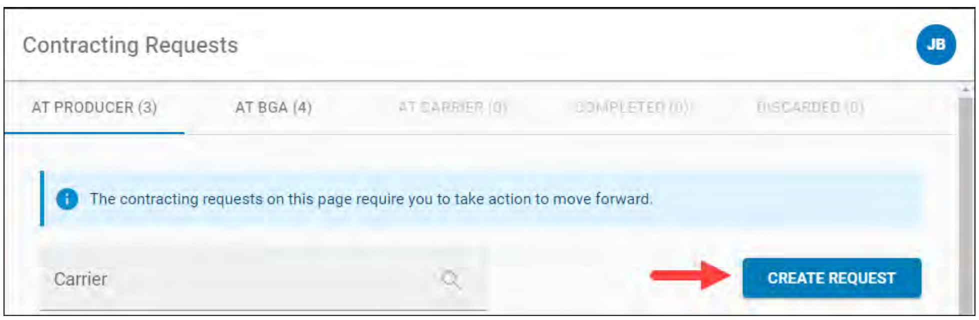
7) How to Create and Submit a New Contracting Request

This article describes how producers can request new carrier contracts using SureLC. Producers must have a SureLC login account with the agency through whom they wish to be contracted with the carrier.

How to Create a New Contracting Request

After logging into your SureLC account, go to the **Contracting Requests** page.

This will take you to the **At Producer** tab by default. Select the Create Request button to begin.



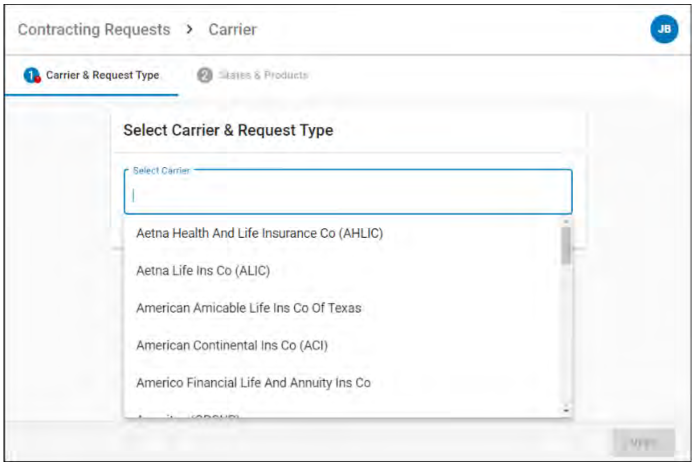
IMPORTANT NOTE: *The **Create Request** button will only be enabled if all required information in your profile has been completed. If there is any missing required info you will see a red notice on the menu and a detailed notice at the top of the Contracting Request page listing the info that must be provided in order to create a new request.*

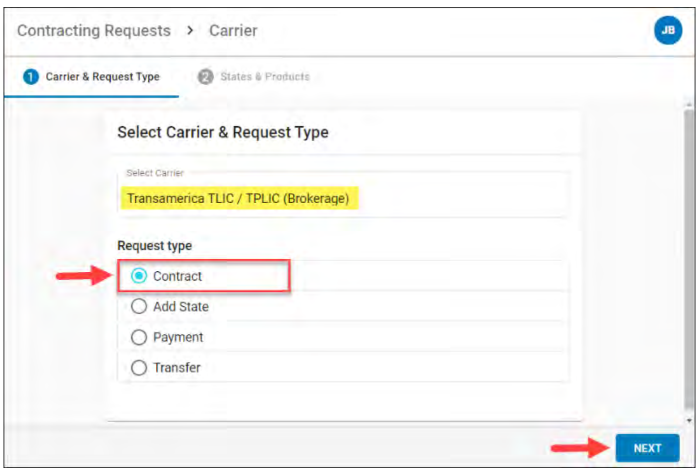
This will take you into the request process with the following steps, depending on the type of request: ***Note****: Not all request types include every step.*

1) Carrier and Request Type
2) States and Products
3) Training
4) Errors and Ommissions
5) Carrier Questions
6) Questionnaire
7) Confirm and Sign

Step 1: Carrier & Request Type

Use the carrier list to select the carrier and then select the request type. In the following example **Transamerica** was selected as the carrier with **Contract** as the request type. Select **Next** to continue.





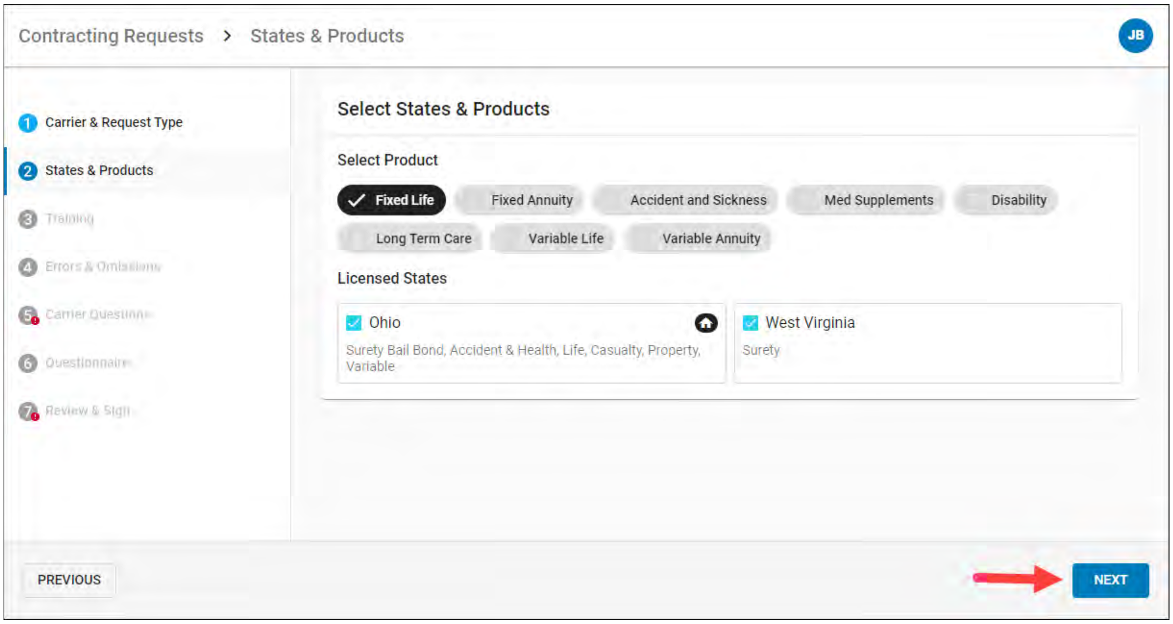
***Please note**: Only carriers that your agency has made available to you are listed here. If the carrier you're looking for is not listed, please contact your agency.*

<u>**Request type definitions:**</u>

- **Contract** - Select when you want to submit a new carrier contract request (and you're not currently contracted with the carrier).
- **Add State** - Select when you're already contracted with the carrier and ONLY want to be appointed in an additional state where you are currently licensed.
- **Payment** - Select when you want to send ONLY updated banking information to the carrier.
- **Transfer** - Select when you are already contracted with the carrier but want to transfer the contract to the agency whose account you are currently logged into.

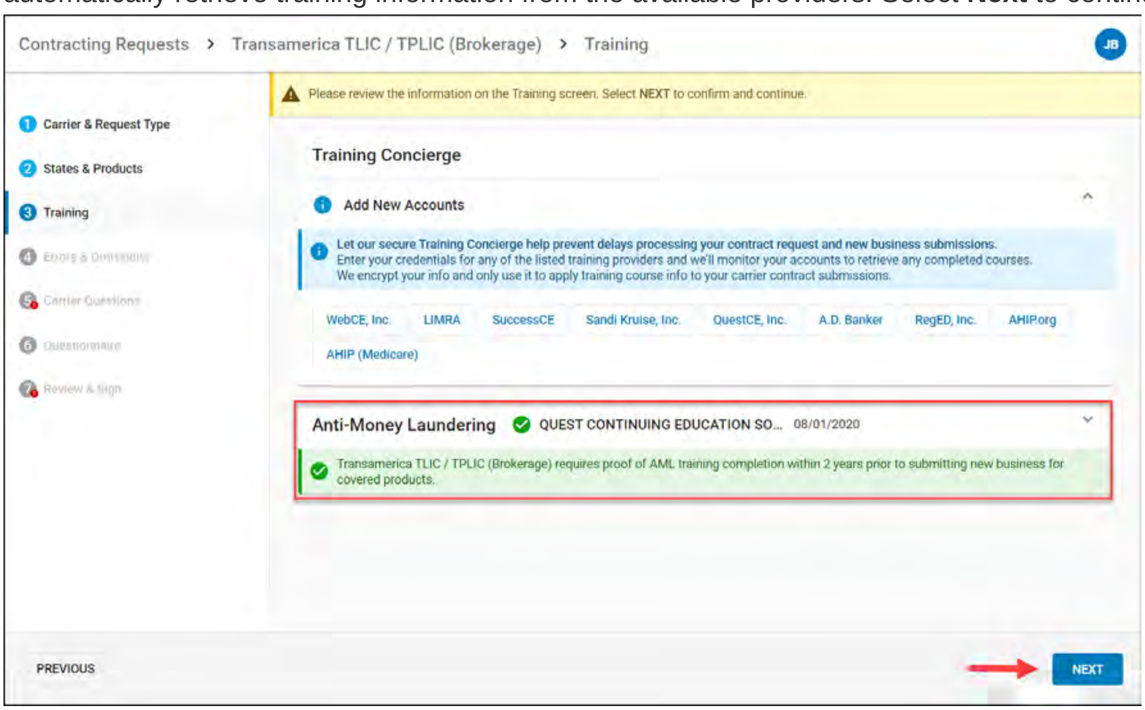
Step 2: States & Products

Next, select the product type(s) you would like to sell, and the state(s) where you would like to be appointed for the carrier. Only states where you currently hold an active license are listed. Your resident state is tagged with a house icon. Then select **Next** to continue.



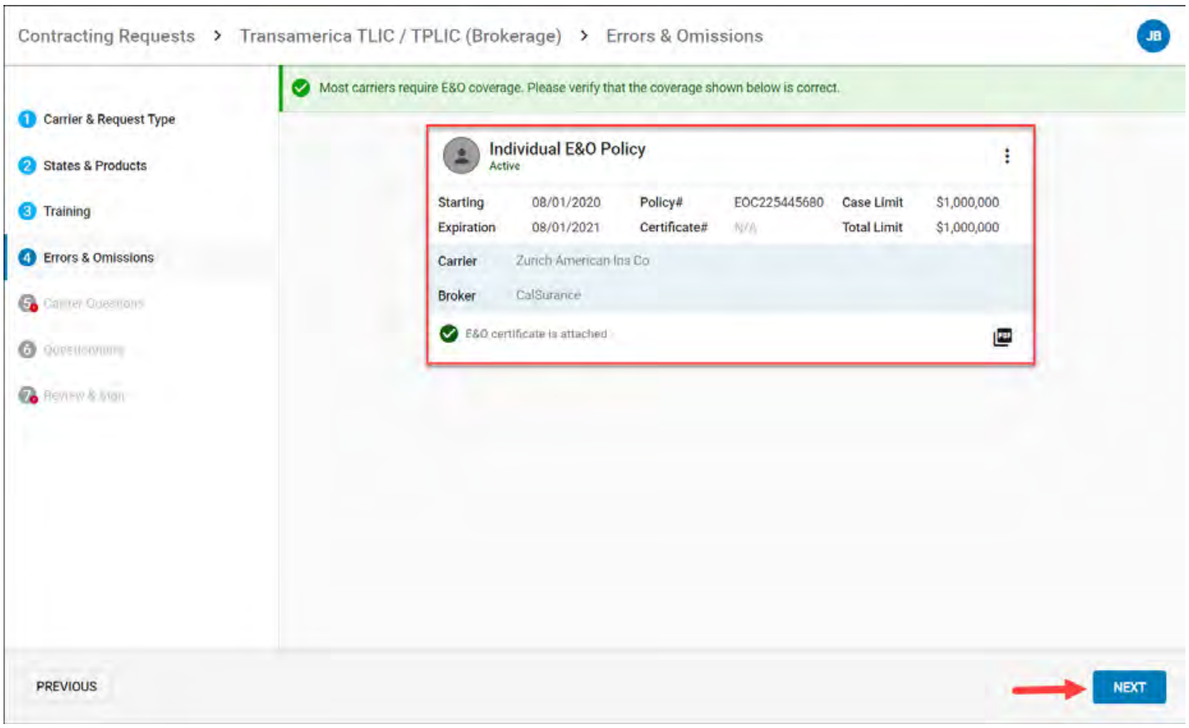
Step 3: Training

On this step if there are any training requirements they will be shown at the top of the page. In the example below, the producer has already uploaded their AML training information which has satisfied the requirement for the carrier. If this information is missing and is required, it will have to be fixed before you'll be able to proceed. You may use the Training Concierge to have SureLC automatically retrieve training information from the available providers. Select **Next** to continue.



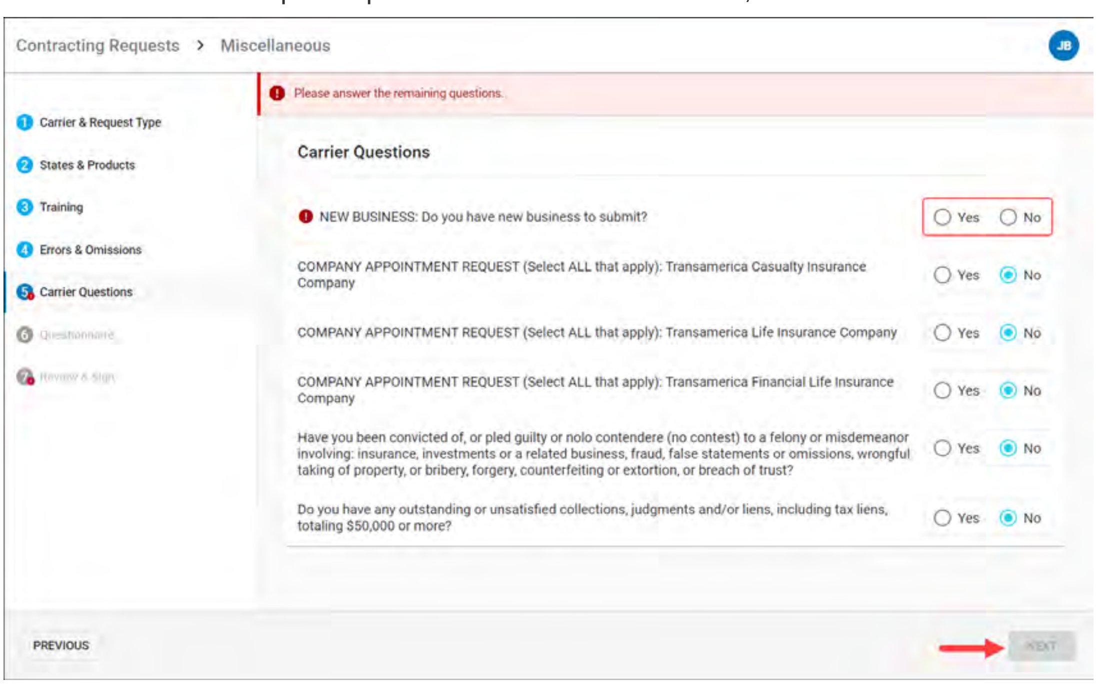
Step 4: Errors & Omissions

Some carriers and agencies require producers to have Errors & Omissions insurance. In the following example, the producer already has an active E&O policy. When E&O coverage is required and no policy information has been added to the producer profile it can be added here. Review the information shown, make sure the requirements have been met, and then select **Next** to continue.



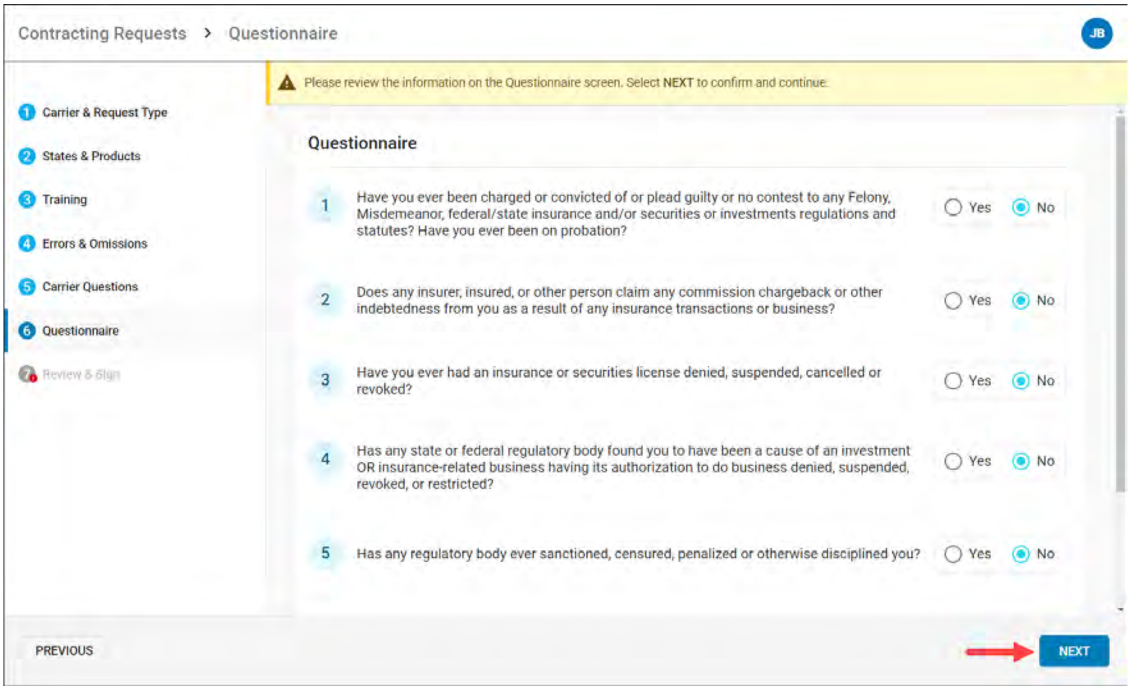
Step 5: Carrier Questions

Review all the carrier questions and provide answers as necessary. Required questions are shown in red. Once all the required questions have been answered, select **Next** to continue.



Step 6: Questionnaire

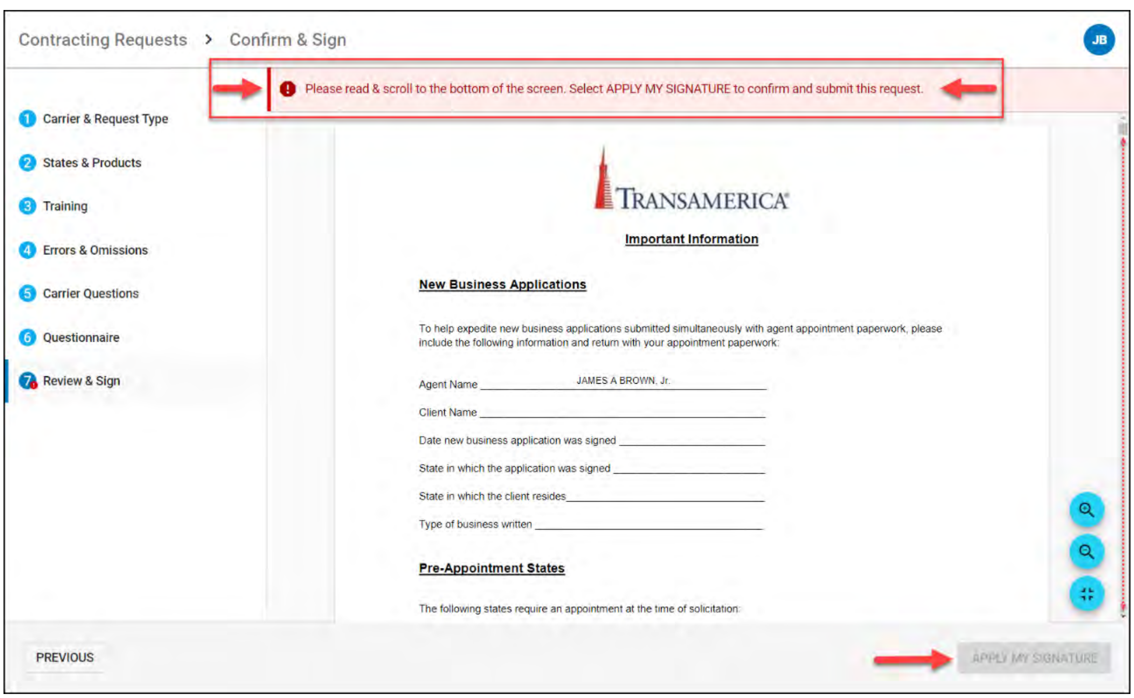
This step asks additional background-related questions that are required in order to submit a contracting request for the selected carrier. These questions provide important background information to the carrier about you (the producer). After reviewing ALL questions, select **Next** to confirm that all answers are current and accurate, and to continue.



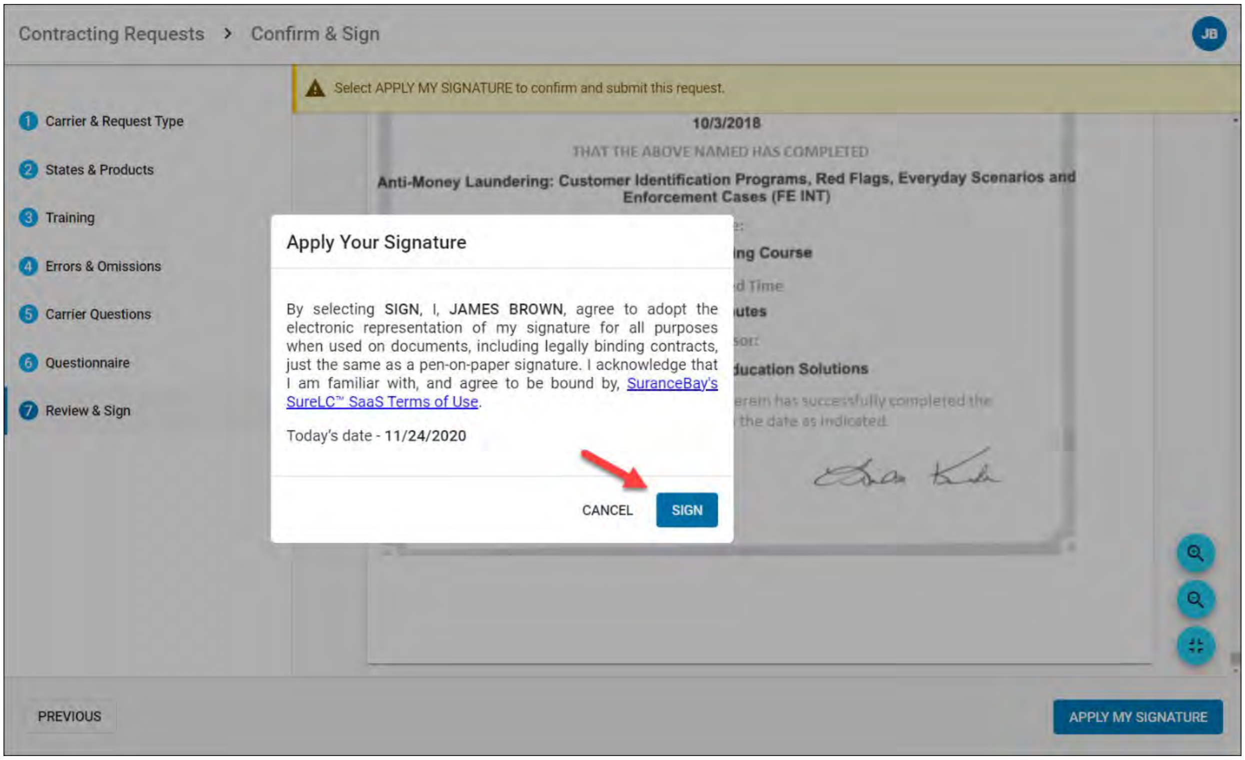
Step 7: Confirm & Sign

On this final step you must review the completed forms. Scroll ALL the way down to the bottom of the page to enable the **Apply My Signature** button. Select the button to continue.

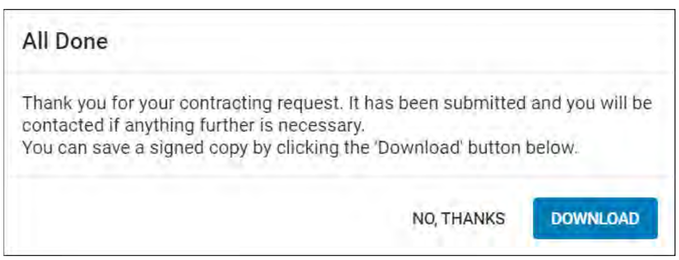
Note: Some carriers may have an additional Signature step that requires you to Review and Sign additional forms. Follow these same instructions on that page, if applicable.



Read the signature attestation and then select **Sign** to compete and submit the contracting request.



Once the request is submitted, you'll be taken back to the **At Producer** tab and the following message will be shown. You may choose to download a copy of the signed paperwork from here.



The request you just submitted will now be listed on the **AT BGA** tab on the **Contracting Requests** page. Your agency will contact you if they have any questions or updates.

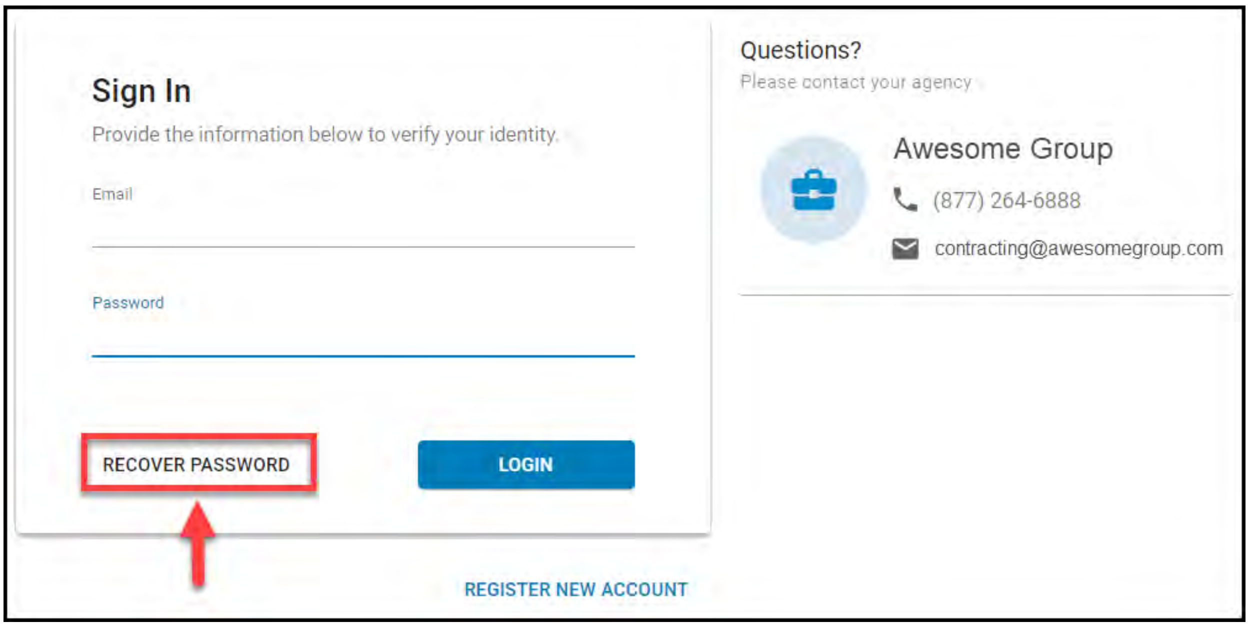
8) Using "Account & Settings" in SureLC

This article explains how to use the Accounts & Settings section of the user options menu within SureLC. From this section users can perform the following actions:

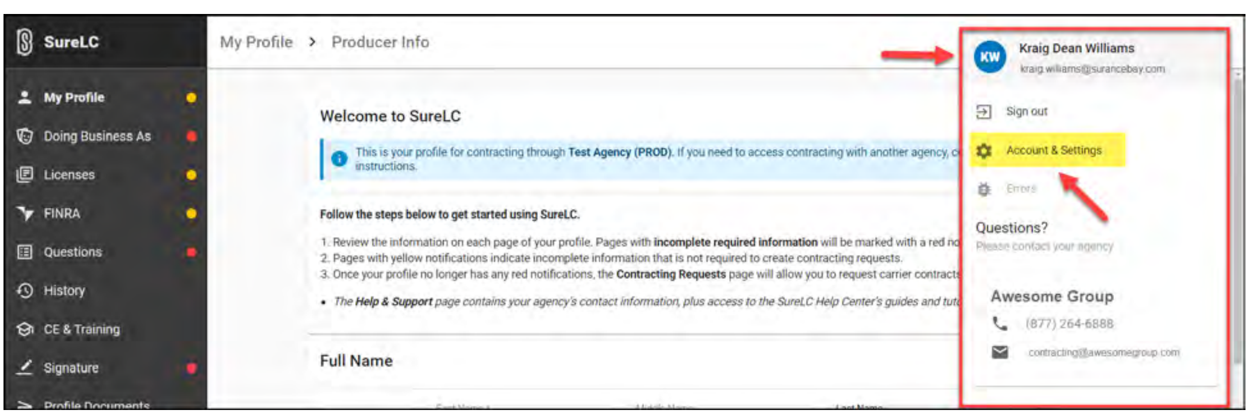
- Login to your SureLC Profile
- Change your User ID
- Change your Password
- Delete your account

Login to your SureLC Profile

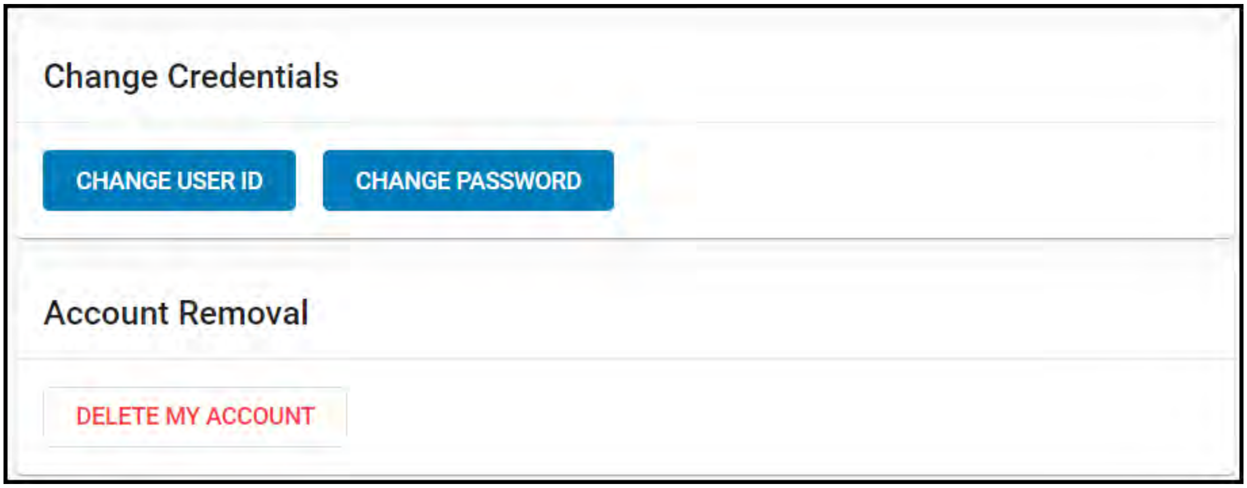
If you don't know your logon credentials, or forgot your password click **Recover Password** and follow the prompts to get the password reset. Click HERE for complete instructions on resetting your SureLC password.



Open the user options menu on the top right by selecting the button with your initials and then select **Account & Settings**.

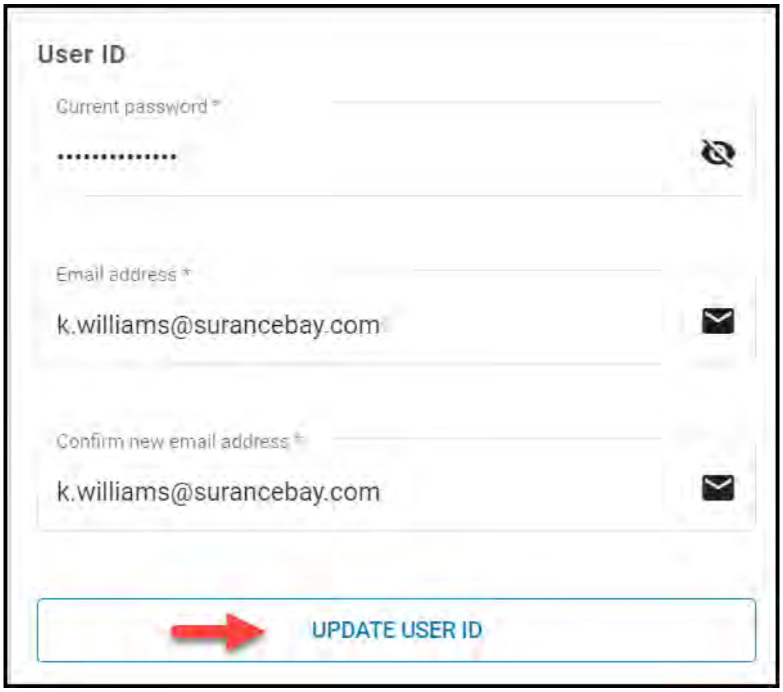


From the Account & Settings page you can change your login user ID or password or delete your account.



Change your User ID

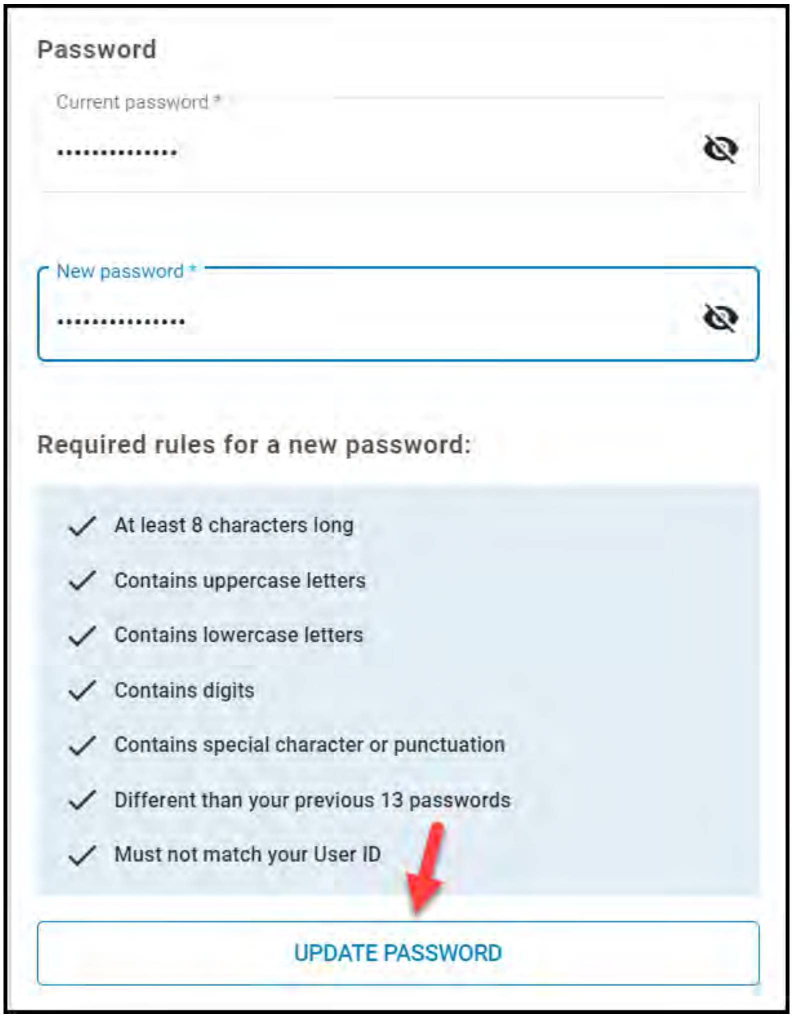
Select **Change UserID** to change the email address used to log into your SureLC Profile. Enter the password associated with this profile, then enter the new email address. Enter it a second time to check for accuracy and then select **Update User ID** to finish**.**



Once completed, the email address you entered will be the UserID email you'll use to log into your profile.
Please Note: Changing the User ID email here ONLY changes it for the SureLC profile under this agency. If you have other SureLC profiles with other agencies this will have no impact on those profiles.

Change your Password

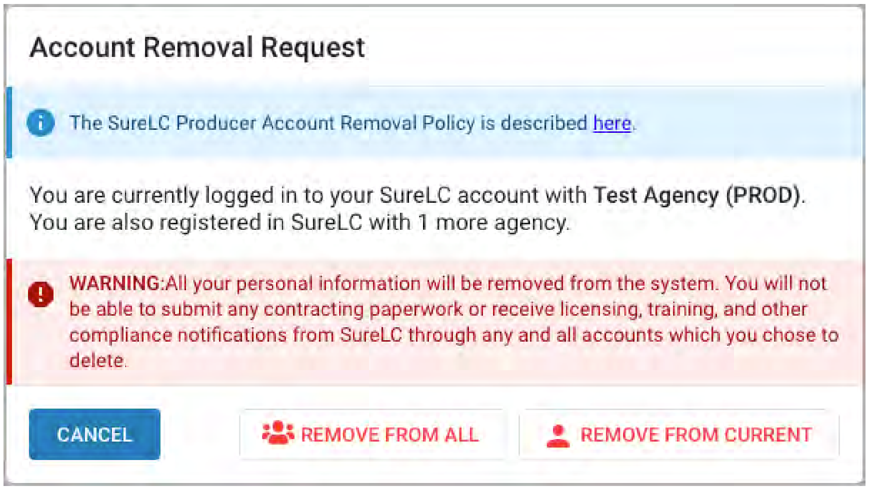
On the **Accounts & Settings** page, select **Change Password**. Enter the current password, then enter the new password, being sure to follow all password creation rules. Once complete, select **Update Password**.



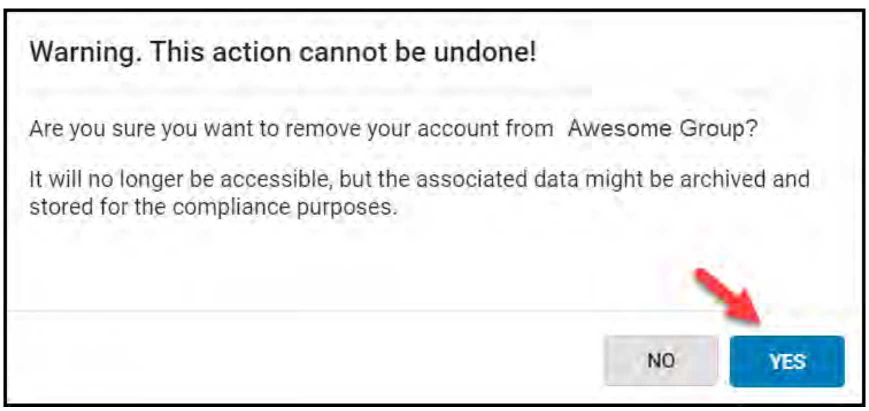
Please Note: This only changes the password for this profile under this agency. If you have multiple SureLC profiles across several agencies, you must login to each profile separately to change those passwords.

Delete your Account

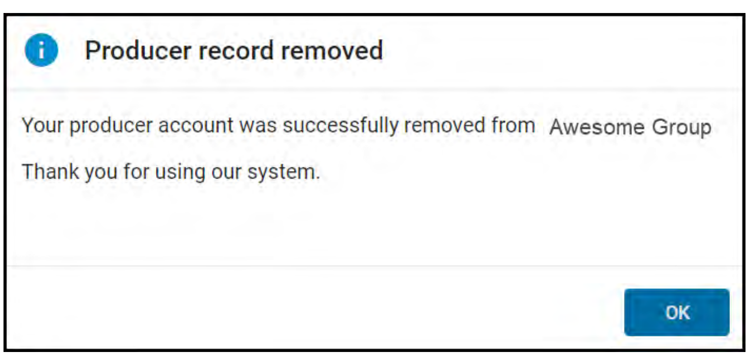
On the **Accounts & Settings** page, select **Delete My Account**. If you are registered with multiple agencies, you'll be asked if you want to remove your profile from just this one agency or from all of them. Be cautious and select the appropriate option.



After selecting one of the options to remove your account a warning message will be shown. Select **Yes** to continue and remove your account.



Once your account has been deleted the following confirmation message will be shown.



Please Note: Removing your profile here does not remove other SureLC profiles you have at other agencies (unless you chose to remove yourself from all agencies).