

SureLC by SuranceBay

Licensing & Contracting Solution
for the L&H Insurance Industry

877-264-6888

info@surancebay.com

SURANCEBAY
EXCEEDING ALL EXPECTATIONS

Frequently Asked Questions

Q. How much does it cost?

A. Email or call us for our current price list.

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Q. Are volume discounts available?

A. Yes. Call or email us and we will be happy to discuss this with you.

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Frequently Asked Questions

Q. Do you integrate with Agency Management Systems (AMS)?

A. Right now, we do not. However, we anticipate full integration with your AMS systems to be available sometime during 2010.

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Frequently Asked Questions

Q. What carriers do you currently have included in your software?

A. We have 35+ of carrier's forms already included in SureLC. We are adding carriers almost daily, so contact us for the most recent list.

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Frequently Asked Questions

Q. How do you save me money?

A. Besides the direct cost savings, SureLC will save your agency and producers a lot of time. Producer set-up times with SureLC should average about 7 minutes, how does this compare to the competition? SureLC also saves you time because you should never, ever, have to print out any carrier L&C forms to manually complete sections that are not auto-filled. Also, NIPR PDB® integration ensures license statuses are maintained and updated daily.

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Frequently Asked Questions

Q. Is the software really as fast as it appears?

A. Yes.

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Frequently Asked Questions

Q. Can you perform a 'batch upload' of my producers to SureLC so I don't have to add each one individually?

A. Yes, when you get started with SureLC, we can upload as many of your producers as you want. Then, as you recruit new producers, you can add them individually.

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Frequently Asked Questions

- Q. Are producers required to download the software to get set-up with my agency?
- A. No, your staff can set up producers themselves. However, the producers are required to manually sign three different pages (Disclosure Page, EFT Authorization, Signature Page) as well as submit a copy of their E&O insurance certificate, if carriers require this.

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Frequently Asked Questions

- Q. What happens if a producer does not know how to scan, or have the ability to scan, the required documents for input into SureLC?
- A. An electronic image of the necessary producer documents (3 or 4 pages) is required. A producer can fax these forms to the agency office, who can then drag & drop the electronic image into the producer's profile for them.

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Frequently Asked Questions

Q. Can I include my agency's specific forms into the system?

A. Yes. This is part of the set up process for your agency. Contact us for more details.

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Frequently Asked Questions

- Q. Can you tell me more about the software from an IT perspective?
- A. Yes. SureLC is technology agnostic. Therefore, for both BGA's & producers, SureLC will work on Mac's, PC's & Linux computers. If a producer has the ability to open a .pdf file, the producer can run our software problem free. The software required to run SureLC is already installed on 98% of all computers worldwide.

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Frequently Asked Questions

- Q. My agency works with institutional producers, and they are not allowed to download software to their computers, how do you address this issue?
- A. SureLC is not the same type of software many institutions are used to preventing. It is much 'lighter' and therefore is likely to be approved by institutions for their employees to use. For example, SureLC runs similar to Adobe Reader. Chances are that institutions allow their employees to open .pdf files (which requires the 'software' Adobe Reader to be 'downloaded' to their computers) and therefore are likely to have no problem with SureLC.

BGA's always have the ability to set-up producers themselves, which does not require the producer to download any software.

Finally, web-based access to SureLC can be made available for those agencies that require it. Contact us for more details.

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Frequently Asked Questions

- Q. Can I transfer all of my agency's producers from the current solution we are using to SureLC?
- A. Yes, you can, but you don't want to. Our best efforts to transfer the data will still require your staff to spend ~ 15 minutes per producer to transfer, due to limitations in the database we are transferring from.

Your staff will spend approximately 5 minutes getting a producer set-up in SureLC, saving 10 minutes per producer.

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Frequently Asked Questions

- Q. What is NIPR and what is PDB® and how does it help my agency?
- A. NIPR stands for National Insurance Producer Registry. PDB® stands for Producer DataBase. SuranceBay ‘pulls’ producer information from this database to streamline the producer set-up process in SureLC. You benefit by reducing the amount of time it takes to set-up a new producer, you get current as well as updated state license status on your producers, as well as carrier appointments history. All this is done automatically, you nor your producer have to spend time maintaining this information.
- Visit www.nipr.com to learn more about NIPR and PDB®.

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Frequently Asked Questions

Q. Do you integrate with LIMRA's AML Certification/Training?

A. Not yet, but we have the ability to do so. According to LIMRA, insurance companies must authorize them to release information to SuranceBay. If carriers elect to do so, we will set up integration with LIMRA.

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Frequently Asked Questions

Q. If I need a carrier included in SureLC that is not already set-up, how long does it take to incorporate this carrier?

A. Typically 72 hours or less. It is quickest for you to submit the carrier forms to us and we will handle the mapping from our software to this carrier's forms. Email them to us at info@surancebay.com.

SuranceBay will work with carriers to ensure compliance standards are met.

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- Q. What does it take to get started with SureLC?
- A. Request our end-user license agreement, sign, and return it to SuranceBay. Pay the required fees. If you are not satisfied during the 30 day trial period, let us know and we will refund your set up and license fees. Per-producer fees (\$3 each) are non-refundable at anytime.

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Frequently Asked Questions

- Q. Does SureLC receive automatic downloads from carriers related to appointment request status?
- A. Not yet, but we have the ability to do so. Once your carrier partners decide to provide SureLC this information, we will set up automatic updates for your agency.

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Additional Questions?

www.surancebay.com

- 877-264-6888 (toll free)
- 813-283-0136 (direct)
- info@surancebay.com

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