

Feb 2, 2026

Day 1 Onboarding

Admin Setup & Compliance

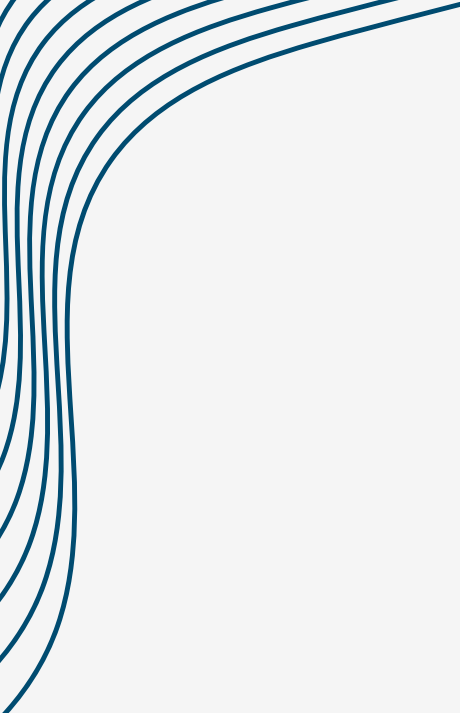


Introduction

Ensuring Agent Readiness for Onboarding

This module is designed to guarantee all agents meet essential **licensing and compliance requirements** before they can engage with clients or begin carrier onboarding.





License & NPN Submission

Essential Steps for Compliance Verification



License & NPN Checklist

Essential Submission Requirements

- License(s) required for verification
- NPN for insurance compliance
- Full legal name matching license
- States licensed for business purposes

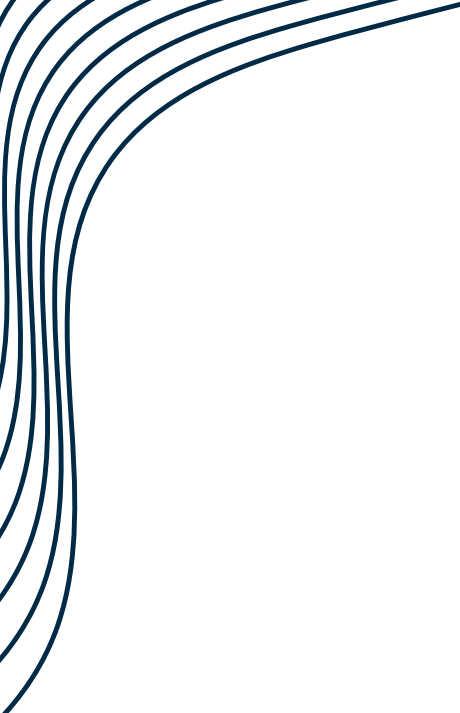


Photo ID & E&O Insurance

Essential compliance for agent onboarding

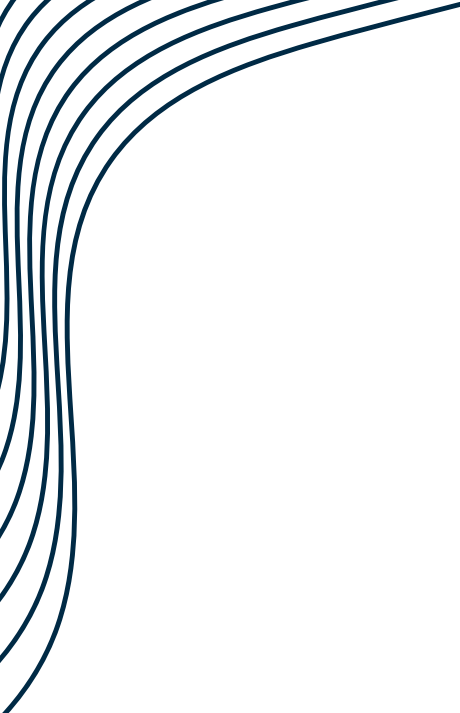


Photo ID Submission Requirements

- Clear government-issued ID required
- Name on ID must match license and NPN
- Submit ID to:
elevatedhealthstacy@gmail.com
- Identity verification is crucial for compliance
- Delays may occur if names do not match

E&O Insurance Coverage Requirements

- Mandatory coverage for agents and clients
 - Minimum coverage: \$1,000,000 per claim
 - Aggregate coverage: \$3,000,000 required
 - Policy must be in agent's personal name
 - No E&O insurance = no carrier onboarding
- 



EIN Registration

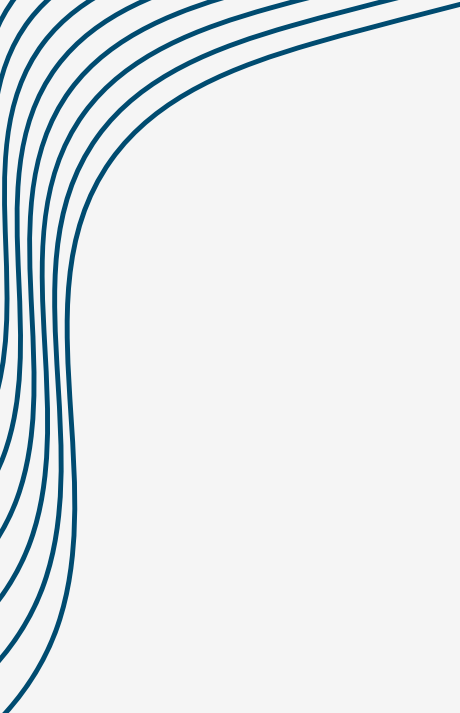
Essential Steps for Compliance and Setup



Internal Agent Information

Required Details for Compliance

- Legal name of agent
- Date of birth
- Home address and phone
- Email and emergency contact



Next Steps

Preparing for Your Onboarding Journey



Completion Checklist

Confirm Required Document Submissions

- License sent
- NPN sent
- Driver's license photo sent
- E&O policy active

Contact Us

Phone

123-456-7890

Email

elevatedhealthstacy@gmail.com

Social

@reallygreatsite

