

ONBOARDING GUIDE FOR ADMINS

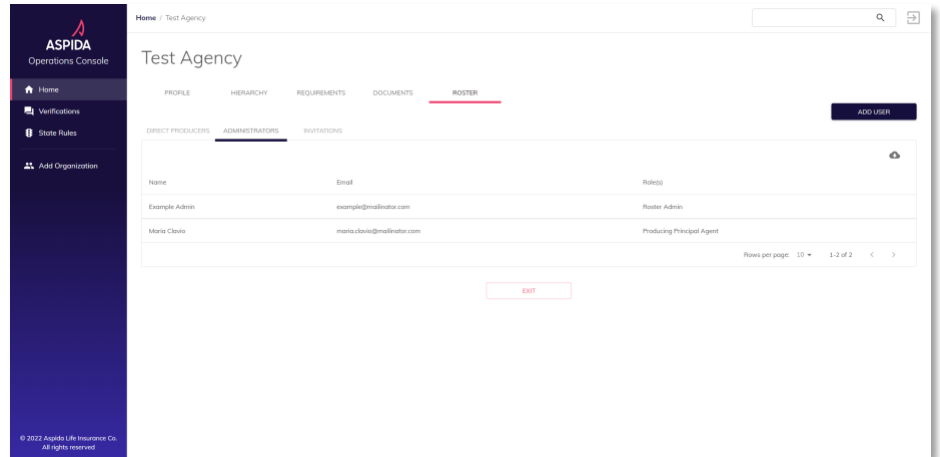
Quick Start Guide



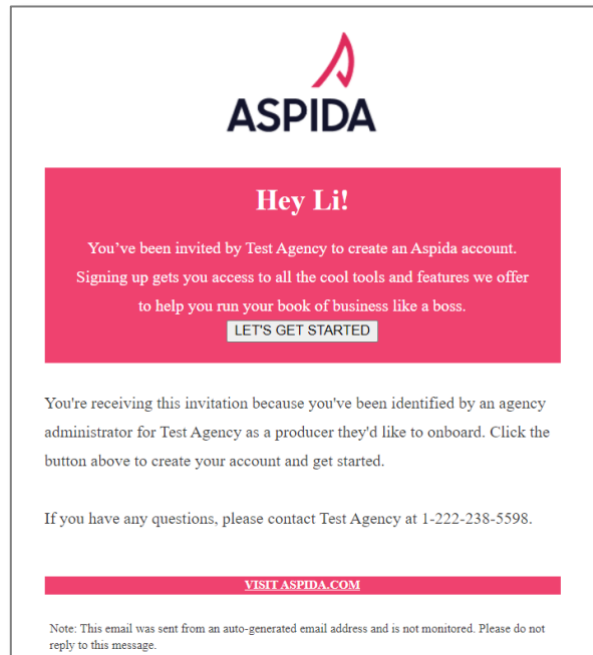
Let's get onboarding! The first step is to complete and submit your agency's onboarding paperwork. If you're submitting through SureLC, simply follow the usual steps to request carrier appointment. If you are submitting a paperwork packet outside of SureLC, you can get the necessary documents from your upline or by contacting Aspida Client Support.

INITIAL ONBOARDING

Aspida will onboard new agencies from our Operations Console and send an invite to the Principal Producer and any other Administrators.



The Principal and Administrators will receive an email. Click Let's Get Started to continue.



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You will be taken to the account creation screen. Enter your Social Security Number and Date of Birth, and then create your password.

ASPIDA

Hi Li! Let's create your account.

Your User ID will be your email address:
li.fan@mailinator.com

Please confirm some details about yourself

Social Security Date of Birth

format: XXX-XX-XXXX MM/DD/YYYY

Create a Password Confirm Password

Must contain one uppercase, one lowercase, one number, one special character, and a minimum of 8 characters.

PROCEED

Enter your phone number to set up multi-factor authentication.

Enter the code to complete authentication and proceed to the distributor portal.

ASPIDA

Authentication Settings

Choose an authentication method each time you log in with a new browser.

Send a one-time code to my phone

Phone Number

format: XXX-XXX-XXXX

Authenticator App

CREATE ACCOUNT

ASPIDA

Two-step Verification

Thanks for keeping your account secure.
Check your mobile device: (xxx) xxx-0978

6-digit code

SUBMIT

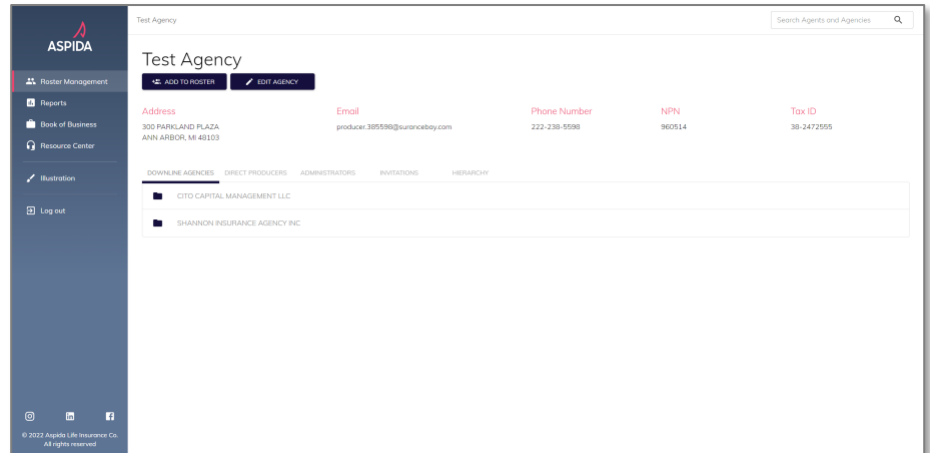
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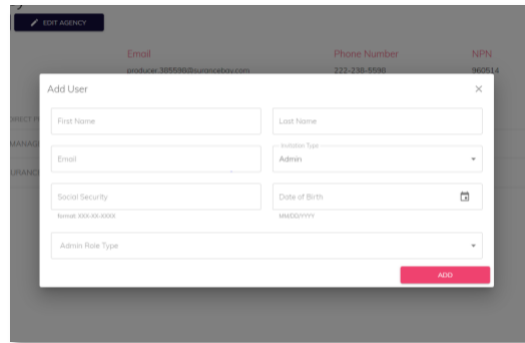


ROSTER MANAGEMENT: ADDING TO YOUR AGENCY'S ROSTER

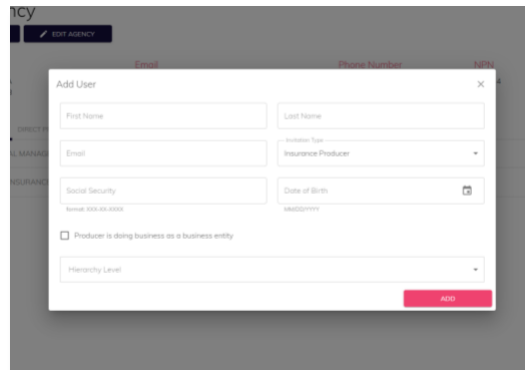
Principal Producers and Roster Administrators can view and manage their roster using the roster management tab.



To add to your roster, click Add to Roster and complete the fields. Selecting Admin under invitation type will cause the Admin Role Type field to show. *NOTE: Roster admins must be set up by Aspida by submitting the Admin Form, available from your upline.*



Selecting Insurance Producer under invitation type will cause the Hierarchy Level field to show.



After you click Add, the invitation will be sent to the producer's email and display on the invitations tab. Once the Direct Producer or Administrator accepts the invitation, they will move to the Direct Producer or Administrator tab.

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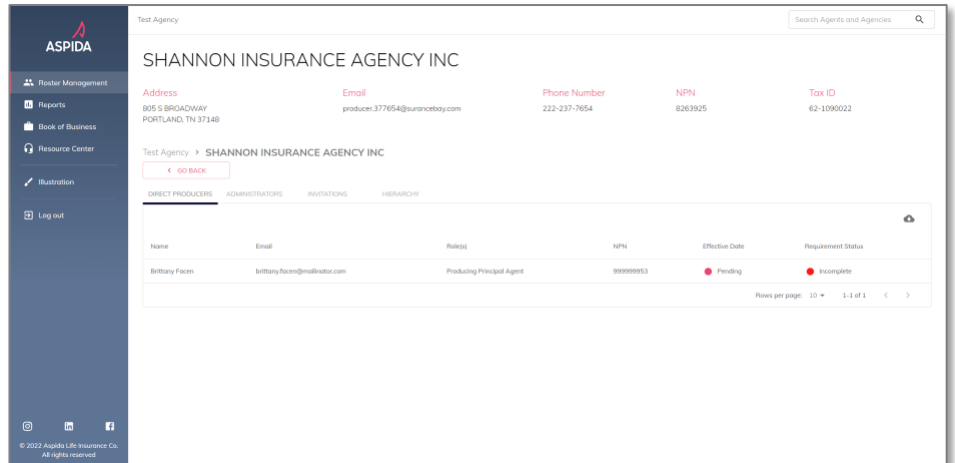
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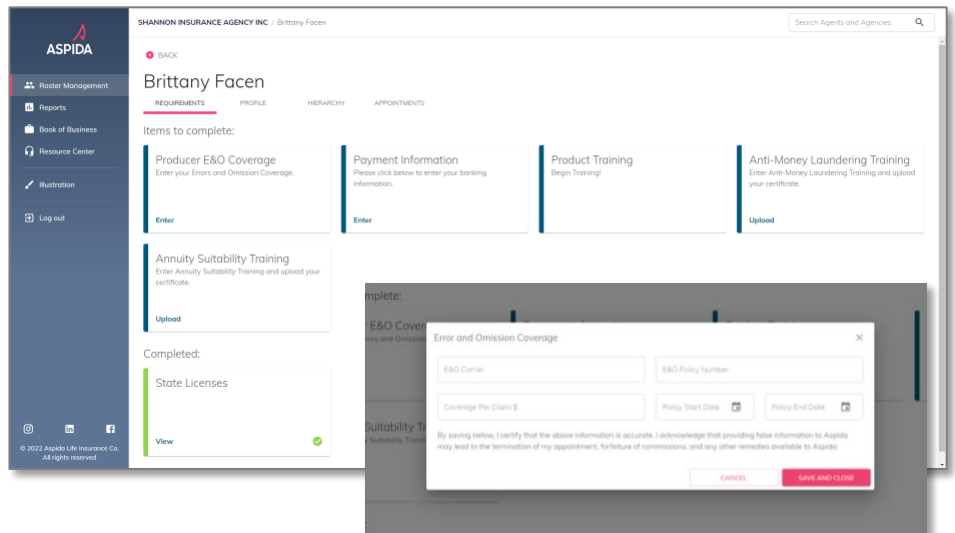
MANAGING YOUR DOWNLINES

To view a downline agency's roster, click on the agency name in the Downline Agencies tab.

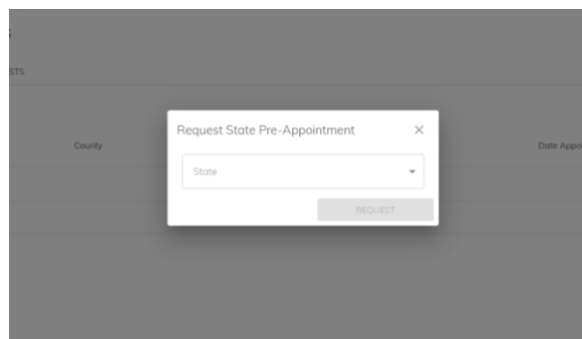
You can also click on a downline agency's producer to view the producer's profile and hierarchy and complete requirements and request appointments on their behalf.



To complete a requirement, click on the tile and complete the required fields.



To request an appointment, navigate to the Appointments tab, click Request Pre-Appointment, select the state, and click Request. Only states requiring pre-appointment will be processed. Just-In-Time appointments will be automatically submitted when an producer completes their first application in a state.



ASPIDA LIFE INSURANCE COMPANY

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newagencyqrg051622

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EDITING AGENCY INFORMATION

To edit the agency's demographic information, click the Edit Agency button, update any fields, and click save.

Test Agency

Agency Name: Test Agency | Tax ID: 38-2472055 | National Producer Number: 902014

Street Address 1: 300 PARKLAND PLAZA | Street Address 2:

City: ANN ARBOR | State: MI - Michigan | ZIP code: 48103

Business Email: producer.385598@euranocology.com | Business Phone: 222-238-5598 | Extension:

CANCEL SAVE

DOWNLINE AGENCIES | DIRECT PRODUCERS | ADMINISTRATORS | INVITATIONS | HIERARCHY

- CITY CAPITAL MANAGEMENT LLC
- SHANNON INSURANCE AGENCY INC

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REPORTING

You can view reporting on the Reports and Book of Business tab. The Book of Business tab will show all the Applications in Progress, Pending Business, Issued Policies, and Withdrawn Applications. The Reports tab will show Hierarchy, Policy, and Commission reporting.

The screenshot shows the 'Book of Business' report with a sidebar on the left containing navigation options like 'Roster Management', 'Reports', 'Book of Business', 'Resource Center', 'Illustration', and 'Log out'. The main content area has a search bar and tabs for 'APPLICATIONS IN PROGRESS (12)', 'PENDING (3)', 'ISSUED (66)', and 'WITHDRAWN (3)'. The 'ISSUED (66)' tab is active, displaying a table with columns: Application, Owner Name, Agent Name, Agent NPN, Product Name, Qualified Status, Signed State, Issued Date, Current Value, Status, and Actions. The table lists several applications, such as AFFIA1831345, AFFIA1831613, and AFFIA1647608.

The screenshot shows the 'Reports' section with a sidebar on the left. The main content area has tabs for 'HIERARCHY', 'ANNUITY DETAIL', and 'COMMISSIONS'. The 'HIERARCHY / Contracting Report' is selected, showing a summary with '14 No. of Agencies' and '27 No. of Products'. It includes a 'Product' list, a 'Contract Effective' date range, and a detailed table with columns: Product, NPN, Contract Effective Date, Contract Date, Type, No. of Policies, No. of Contracts, No. of Policies, No. of Contracts, No. of Policies, No. of Contracts, No. of Policies, No. of Contracts. The table lists various products and their associated metrics.

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Reports

Search Agents and Agencies

Reports

HERARCHY ANNUITY DETAIL COMMISSIONS

3
No. of Applications

Click to expand

Product: **Health Plan**

Signed Date: 4/1/2022

Qualified Status: Non-Qualified Lower Tier In-Progress Approved

Requirement Status: Lower Tier In-Progress Approved

Final Status: In-Progress Approved

Number	Signing Date	Product	SP#	SP#	Amount	Annuitant DOB	Age	Gender	Product Name	Qualified	Signed Date	Signed Date	Cr. In-Pr.	Estimated Amount	Status
AP0000000001	03/25/22	Health Plan	000001	000001	100,000	1/1/1988	32	Female	Health Plan (HSA)	Non-Qualified	4/1/2022	4/1/2022	0.00%	2,000.00	Approved
AP0000000002	03/25/22	Health Plan	000002	000002	100,000	1/1/1988	32	Female	Health Plan (HSA)	Non-Qualified	4/1/2022	4/1/2022	0.00%	2,000.00	Non-Submitted
AP0000000003	03/25/22	Health Plan	000003	000003	100,000	1/1/1988	32	Female	Health Plan (HSA)	Non-Qualified	4/1/2022	4/1/2022	0.00%	2,000.00	Non-Submitted
Total														6,000.00	

ANNUITY DETAIL

Reports

Search Agents and Agencies

Reports

HERARCHY ANNUITY DETAIL COMMISSIONS

\$442,769.86
Net Commission

Disbursement Data: 4/1/2022 - 6/30/2022

Level: Agent Branch

Commission Agent Code	Commission Agent Name	Commission Type	Commission Date	Number	Product Name	Policy Status	Net	Commission	Disbursement Date	Age	Gender
000001	ASPIDA LIFE INSURANCE CO	Branch	4/1/2022	AP0000000001	Health Plan (HSA)	Non-Qualified	2,000.00	2,000.00	4/1/2022	32	Female
000002	ASPIDA LIFE INSURANCE CO	Branch	4/1/2022	AP0000000002	Health Plan (HSA)	Non-Qualified	2,000.00	2,000.00	4/1/2022	32	Female
000003	ASPIDA LIFE INSURANCE CO	Branch	4/1/2022	AP0000000003	Health Plan (HSA)	Non-Qualified	2,000.00	2,000.00	4/1/2022	32	Female
Total							6,000.00	6,000.00			

COMMISSIONS