



Selling Preferences and Active Selling Permissions

After registration and login, go to the Account screen by clicking the agent's name in the upper right corner, then clicking Account. Agents can check and update their contact information, selling preferences, and active selling permissions with carriers.

Selling Preferences

Go to the Selling Preferences section and choose the product(s) to quote – Life, Health, or both. This will make the quote / application process quicker and easier. It can be changed at any time.

Active Selling Permissions

Agents will only be able to apply for a plan if they have Active Selling Permissions for it, so it's important to review the Active Selling Permissions section of the Account page before starting a Quote.

Missing permissions can be added in the Self-Attested Permissions section. Click on either Life or Health, then click Add New.

Life Active Selling Permissions

- Life Selling Permissions are for Final Expense Plans
- Agents can attest to Selling Permissions for all supported Final Expense carriers
- Adding Life Selling Permissions also allows agents to get Single Sign On access to available carrier websites for eApplication. Those applications will be pre-filled with the information from the Contact record, and the policy information will be available in Integrity once it's approved.

Selling Preferences

Quote Life Products

Enable quoting Final Expense products in Client Manager and Personal Website.

Quote Health Products

Enable quoting Medicare products in Client Manager and Personal Website.

Active Selling Permissions

Life ⓘ

Health

Carrier:
Aflac

Products:

FINAL EXPENSE PRODUCT 1

FINAL EXPENSE PRODUCT 1

FINAL EXPENSE PRODUCT 1

Producer ID:
123456789

Carrier:
Humana

Products:

FINAL EXPENSE PRODUCT 3

Producer ID:
123456789

Carrier:
United Healthcare

Products:

FINAL EXPENSE PRODUCT 2



Selling Preferences and Active Selling Permissions

Health Active Selling Permissions

- Health Selling Permissions include Medicare Advantage and Prescription Drug Plans
- Agents can attest to selling permissions for additional states and products for their existing carriers
- Attested Permission(s) will be checked against the carriers' records. If the Self-Attested Permission hasn't been verified by the carrier after five days, the Self-Attested Permission will be removed.

Self-Attested Permissions Add New +

Life
Health ⓘ

| | |
|---|--|
| Carrier: Humana States: MA Products: MA | Year: 2023 ID: 1234567 Added 5-08-22 Delete 🗑️ |
| Carrier: Humana States: TX Products: MA | Year: 2023 ID: 1234567 Added 5-08-22 Delete 🗑️ |
| Carrier: Humana States: UT Products: MA | Year: 2023 ID: 1234567 Added 5-08-22 ⓘ Expired Delete 🗑️ |

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