

Mentor & Agent Contracting Guide

Health and Life Insurance Carrier Contracting Tracker

Date Applied | Writing Number | Enrollment Link | Back Office Link | Username | Password



CHC Email: _____

Broker Website: _____

Mentor Name: _____

Agent Name: _____

NPN: _____

Last Updated: _____

Pre-Contracting Checklist:

- ☐ Confirm agent legal name, preferred email, phone, and resident state.
- ☐ Verify NPN and active license status before carrier submission.
- ☐ Confirm E&O, AML, direct deposit, and tax documents as applicable.
- ☐ Use one tracking row per carrier, even when multiple links arrive.
- ☐ Record date applied the same day the contracting link is completed.
- ☐ Search startworktoday.com before requesting any resend.
- ☐ Check the carrier-specific source column for follow-up emails.
- ☐ Capture writing number as soon as approval is issued.
- ☐ Save enrollment and back office URLs after login is confirmed.
- ☐ Use approved secure storage for credentials; avoid shared passwords.

Health Insurance Carrier Checklist:

Track contracting, writing numbers, enrollment links, back office access, and credential references in one place.

REMINDER: Carrier contracting links should come from startworktoday.com. LifeX Research and Iron Health carrier emails should come from KMG; Enroll Prime from Support; All-State (Nationwide) from NGIC; UHC from U65.

CARRIER	EMAIL SOURCE TO WATCH	DATE APPLIED	WRITING NUMBER	ENROLLMENT LINK	BACK OFFICE LINK	USERNAME/ PASSWORD	NOTES/ STATUS
	Link: startworktoday.com Carrier Link: KMG Must complete Recruiter exam 1st						
	Link: startworktoday.com Carrier Link: KMG						
	Link: startworktoday.com Carrier Link: Support						
	Link: startworktoday.com Carrier Link: U65						
	Link: startworktoday.com Carrier Link: Flex						
	Link: startworktoday.com Carrier Link: NGIC Will complete an onboarding 1st						

Health Contracting Workflow:

- ☐ Confirm contracting link received from startworktoday.com.
- ☐ Complete application and enter Date Applied.
- ☐ Forward or save carrier-specific email confirmation in email folders.
- ☐ Record writing number after approval.
- ☐ Add enrollment link once issued or confirmed.
- ☐ Add back office link after login is active.
- ☐ Store credentials securely; update this checklist with reference only.
- ☐ Mark status as Pending, Returned, Approved, or Active.

Life Insurance Carrier Checklist - Equita

Life Contracting Source

Contracting link emails should be expected from startworktoday.com AND then EFES marketing with a link to SURELC. Be sure to record carrier writing #s as they come in.

CARRIER	CONTRACTING SOUR LINK	DATE APPLIED	WRITING NUMBER	ENROLLMENT LINK	BACK OFFICE LINK	USERNAME/ PASSWORD	NOTES/ STATUS
Foresters Term	SureLC						
F&G IUL (Fidelity & Guarantee)	SureLC						
SBLI Term	SureLC						
AmAm (American Amicable) Term	SureLC						
MOO (Mutual of Omaha) Term/FE	SureLC						
American General FE	SureLC						
Assurity LTD/STD/LTC	SureLC						
American Home Life FE/WL	SureLC						
Transamerica Term	SureLC						
Banner Term	SureLC						

Life Contracting:

- ☐ Verify the agent has completed life contracting steps on CHCagents.com-LIFE ROADMAP
- ☐ Bookmark enrollment and back office links after access is confirmed.
- ☐ Confirm login works before marking carrier Active.

*****NAVIGATOR-YOUR QUOTING TOOL- ACCESS WIL BE GIVEN AFTER YOU HAVE WRITING NUMBERS WITH AT LEAST ONE CARRIER****

Handoff Standard

A carrier should not be marked Active until the writing number, enrollment or carrier sales link, back office access, and secure credential storage have all been confirmed.

