USER GUIDE
ANNUITY TRAINING PLATFORM

RegEd

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1.0 OVERVIEW

As the leading industry platform with several large carriers, RegEd's Annuity Training Platform is the solution for reducing the annuity training burden and keeping producers focused on selling.

+ Producers are able to easily register and meet multiple carrier requirements on one platform, providing access to state suitability and carrier-specific product training courses.
+ Distributors can see an agent's complete compliance profile for annuities training, including both state suitability requirements and carrier-specific product training.
+ Producers can easily maintain compliance with the state suitability requirements for the states in which they sell annuities. The platform has an extensive rule base to determine reciprocity rules and initial and ongoing training requirements.

The main page of the Annuity Training Platform displays a map of the United States. Hover over each state to view basic annuity training requirements or click on the state to view a more in-depth description of each state's requirements and reciprocity rules.

2.0 REGISTRATION AND LOGIN

Users self-register on the RegEd Annuity Training Platform.

+ **Step 1.** Users go to https://secure.reged.com/TrainingPlatform/.
+ **Step 2.** Select Register Online on the right under **Producers Get Started**.
+ **Step 3.** Complete the registration form.

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Self Registration

Login Information

The security questions / answers are required to help you reset your password, if you forget your password.

*Login Email:		Will be used as Login Name and Contact Email
*Password:		(Passwords must be at least 8 characters, and contain at least 2 alphabetic characters and 2 numbers)
*Verify Password:		
*Security Question 1:	Select Question ▾	*Answer:
*Security Question 2:	Select Question ▾	*Answer:
*Security Question 3:	Select Question ▾	*Answer:

(You must select 3 different questions and provide 3 different answers which do not match your password.)

Identifying Information

We require your Social Security Number and Date of Birth to process your CE as per state requirements.

Prefix:	▾			
*First Name:		*Last Name:	MI:	Sfx:
*Social Security #:	__ - __ - __			
*Verify Social Security #:	__ - __ - __			
*Date of Birth:	▾ ▾ ▾			
*National Producer Number (NPN):		○ Find NPN		

Business Address

*Address Line 1:			
Address Line 2:			
*City:		*State: Select a state ▾	* Zip Code:
*Country:	United States ▾		
*Phone:		Ext:	
Fax:			

Shipping Information

We require your shipping address to send you your certificates as per state requirements.

◉ Same as Business Address   ○ I want to enter different Shipping Information

Home Information

◉ Same as Business Address   ○ I want to enter different Home Information

Terms of Service

☐ I accept the **Terms of Service** and site usage requirements

* Denotes required field

○ Register   ○ Clear Form

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ABOUT SSL CERTIFICATES

3.0 PRODUCT TRAINING

- Product training is assigned automatically by a carrier through daily data feeds to RegEd or ordered with a product code by the user. Upon login, the Producer Status page displays all currently assigned and ordered carrier-specific product training. The user is also shown their current annuities state suitability compliance summary. To update RegEd with states the user is licensed in, select **Manage My State Suitability Requirements**.

3.1 Assigned Product Training

Assigned product training displays for the user on the main page. Courses are grouped by the carrier and immediately accessible by selecting the **Go To Requirement** button. Assigned product training courses are also accessible from the left frame menu, grouped by Carrier name.

Select a course and an informational service page will display, then select **Proceed** to begin the course. If the carrier has chosen not to display a service page for the course, the course will begin immediately.

Use the buttons ( ) in the bottom middle of the page to navigate through the course. There is an X button in the top right to leave the course ( ) and return at a later date.

3.2 Enter Product Code

If a carrier has provided a Product Code (or a Just-In-Time code) to access a course, enter the code to immediately add the course as an available option on the Producer Status homepage. The product code can be entered:

+ in the field within the Carrier-Specific Training section
+ by selecting Enter Product Code on the left-side menu and entering the code on that page

After selecting **Submit**, you are returned to the Producer Status page and the new course is listed under the program status grid under Carrier-Specific Product Training.
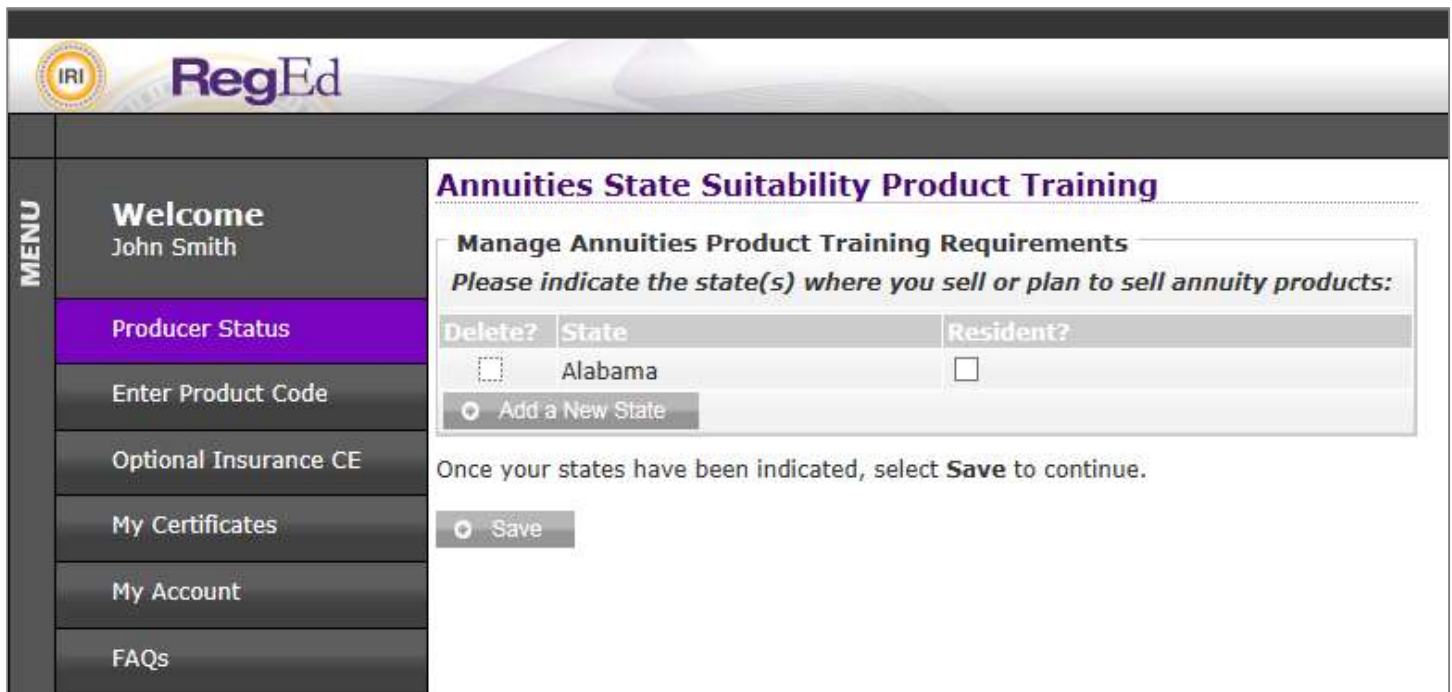
4.0 MANAGE MY STATE SUITABILITY REQUIREMENTS

Users are able to indicate in which states they are licensed. This allows the ATP platform to help the user stay up-to-date on training requirements.

Select the **Manage My State Suitability Requirements** button on the Producer Status page.

+ Use the checkbox under the **Delete** column, then click **Save** to remove a state in which you are no longer licensed.
+ Use the checkbox under the **Resident** column, then select **Save** to indicate you have a resident license in the state.
+ Select the **Add a New State** button to include additional states in which you are licensed.
+ Enter additional information as required by some states in order to ensure training recommendations are accurate.

5.0 STATE ANNUITY SUITABILITY TRAINING

Users are able to gain access to RegEd's annuities suitability courses designed to meet state training requirements. The user is able to order insurance CE credit(s) with the courses. Course completions are reported to participating carriers on RegEd's Annuity Training Platform.

Select **Proceed** to continue to the My Courses page.

A. **Active Courses**

Active Courses shows the courses the user has already ordered. If no courses have been ordered, this area will be blank.

B. **Course History**

The **My Courses** page allows the user to view their course history and access course completion certificates.

C. **Select New Courses and CE Credit**

Select this option to begin ordering a course(s).
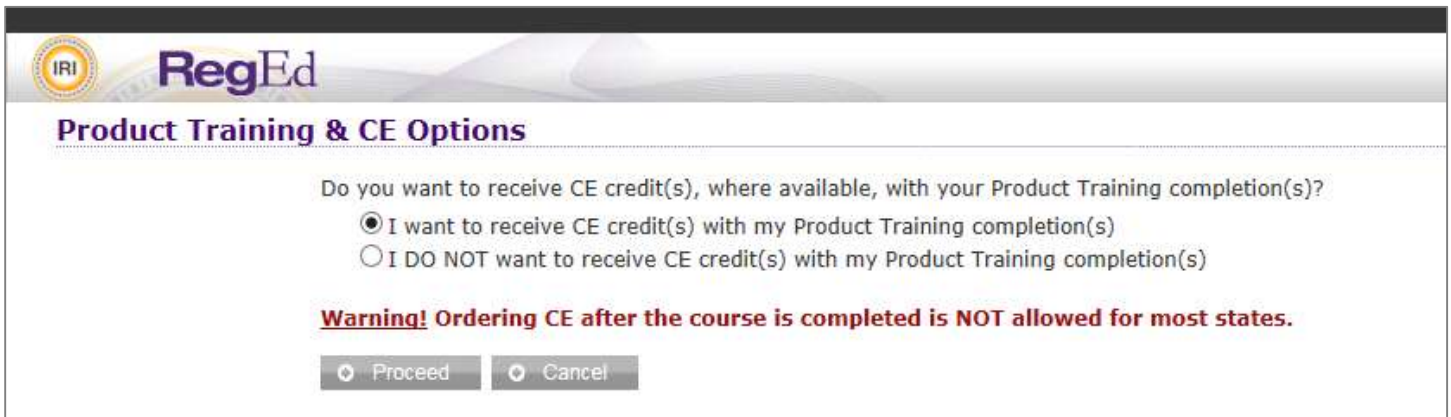
D. **Order Additional Insurance Credit**

Select this button to order additional CE credit for a course that has already been completed. Note that additional CE orders are subject to state regulations; some states do not allow CE to be ordered after a course has already been completed.

E. **Courses Ordered**

Courses already ordered or in progress are displayed here with an option on the right to **Go To Course**.

Click on **Select New Courses and CE Credit** to order state annuity suitability training courses.

Select whether you want to order CE with your course and then select **Proceed.**

The next page displays state specific CE information. Review the information, scroll to the bottom and select **Proceed**.

CE credit will be ordered with the appropriate Annuity course for each state the user has entered on the Producer Page through **Manage My State Suitability Requirements**. Review and confirm the information on the page, then select **Submit Your Order**. The user is then required to enter credit card information to pay any applicable fees. The user can then complete the course order by selecting **Submit Your Order** on the bottom of the page. The user is returned to the My Courses page and the new course is available to begin via the **Go To Course** link.

6.0 OPTIONAL INSURANCE CE

The optional insurance CE catalog allows the user access to RegEd's insurance course catalog. The user is able to order insurance courses and CE in various states. RegEd rosters the CE completion to the state(s) automatically once the course is complete.   Upon selecting the Optional Insurance CE menu item, the user is taken to the My Courses page, showing any ordered courses or courses already in progress.

+ Click **Select New Courses and CE Credit** button to begin.
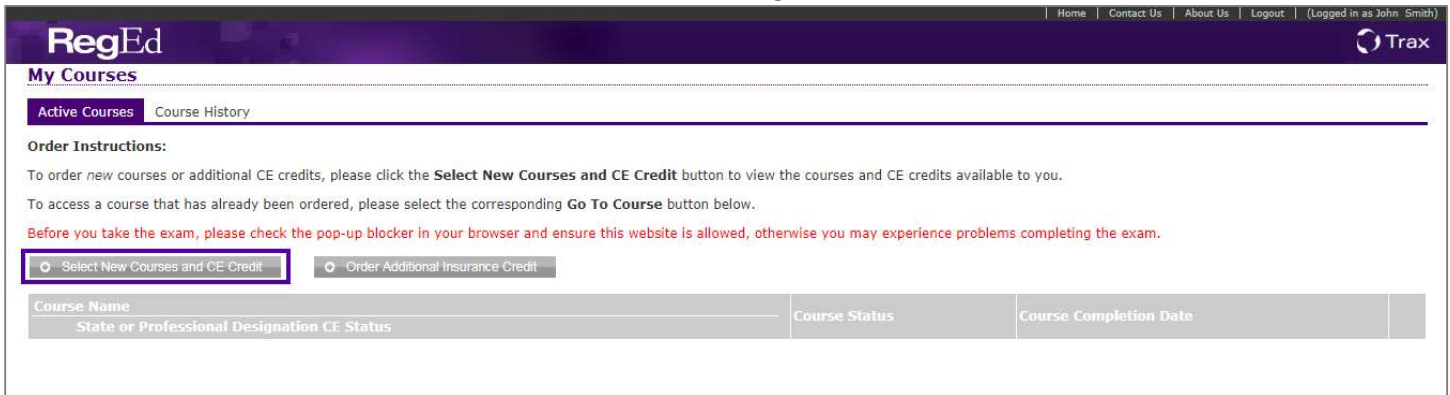
+ Select the radio button for "**I want to receive Insurance and/or Professional Designation CE Credits**" to choose a course that offers continuing education credits.
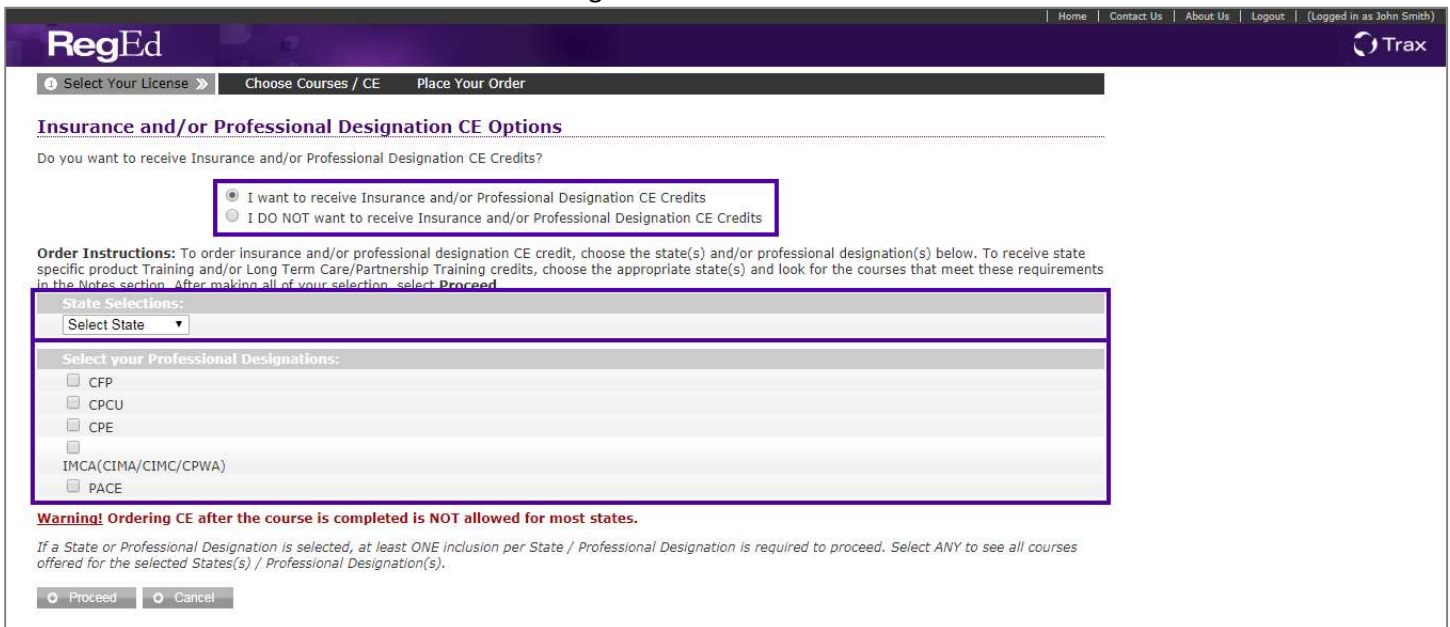
+ Select a state for CE credit from the dropdown option that appears. Multiple states can be chosen by selecting additional states from subsequent dropdown lists.

+ Select a specific type of CE credit (annuity, ethics, long term care, etc.) as a filter to only display courses that satisfy this credit type. The list of credit types is only available after selecting a state from the drop down as each state may have approved different RegEd courses for different types of CE credit. The user may select any combination of checkboxes.

+ Select any applicable professional designations for CE credit using the checkbox.

+ Select **Proceed** to view a list of available courses.

Review the list of available courses. The list of courses is sorted by the type of CE each course offers. Any courses that satisfy all of the pre-selected CE types are listed first, then the list is broken down by the CE type each available course offers.

If multiple states are selected, the results will list courses that satisfy CE requirements in all chosen states first. The results display a header in purple at the top of each section indicating what state and CE type the courses in the section satisfy.

+ Select the checkbox next to each course needed. The CE Credit box for each will be automatically selected to order CE for the course. The list shows the cost of the course (if applicable), the cost of the CE certification (if applicable) and the state fees (if applicable).

+ Select **Manage My Selection** to modify the search criteria and search again.

+ Scroll to the bottom and Select **Proceed** after choosing all desired courses to continue to a page detailing the specific state requirements for CE.

+ Read the state information carefully to ensure compliance with each state's rules and regulations regarding CE completion. If multiple states were selected, the page details information for each state's requirements.

+ Select **Proceed** at the bottom of the page.

+ Enter personal information required to complete the CE order then select **Submit Your Order** at the bottom of the page.
+ A credit card payment screen will appear next. Enter valid credit card information and select **Submit Your Order** at the bottom of the page to complete your course CE order. The user will then move back to the **My Courses** page with the new insurance course(s) available to begin.
+ RegEd rosters the CE to the appropriate state upon completion of each course where CE credit was ordered.

7.0 MY CERTIFICATES

The My Certificates page lists any completed CE, the date completed and a link to download the certificate of completion.

8.0 MY ACCOUNT

The My Account page allows the user to update personal information saved in RegEd, such as login security questions, national producer number, business address and home address. This page also displays order history and allows the user to view receipts from past orders.

9.0 ADMINISTRATIVE FEATURES

9.1 Producer Lookup

Administrative users are able to look up an individual producer by a combination of name and national producer number or name and social security number. Administrators are able to lookup producers that have accessed or completed their firm's product training.

+ **Step 1:** Select **Producer Admin Status**.
+ **Step 2:** Enter the producer's **First Name**, **Last Name**, and **National Producer Number** or **Social Security Number**.
+ **Step 3:** Select **Search**.

+ **Step 4:** Select the magnifying glass to view training assignment and completion information for a producer.

The producer's completion data shows for their resident and non-resident licensed states, state suitability training completion and carrier-specific product training.

9.2 Reports

Administrative users are also able to run reports to view assignments and completions for the firm's product training courses and gather information about the producers taking their courses.

The Reporting home page organizes available reports into sections for each RegEd application. Click on a header to view the available reports for each application.

+   **Carrier Specific Product Training Status**
    This report displays the status of individuals' assigned product training courses.
    This report includes the following fields: Name | Producer Email | Producer NPN | Producer SSN | Requirement Name | Requirement | Date Requirement Assigned | Date Complete

+   **Producer Information**
    This report displays user profile information in RegEd.
    This report includes the following fields: Prefix | Name | Middle Initial | Suffix | Producer's SSN | Producer's NPN | Business Email | Business Address 1 | Business Address 2 | Business City | Business State | Business Zip | Business Phone | Business Fax

+   **Producer Training Requirements Not Ordered**
    This report displays users with assigned courses that have not yet been ordered (accessed) by the user.
    This report includes the following fields: Name | Producer Email | Producer NPN | Producer SSN | Requirement Name | Requirement | Date Assigned | Date Complete

+ **Producer Training Requirements Ordered**
  This report displays users with an assigned course(s) that have accessed the course(s). This will include users that have completed or partially completed the course.
  This report includes the following fields: Name | Producer Email | Producer NPN | Producer SSN | Requirement Name | Requirement | Requirement Date Assigned | Ordered Date | Date Complete

+ **State Suitability Training Completions**
  This report displays completion information for users that have taken a state suitability course.
  This report includes the following fields: Name | Producer's Email Address | Producer's NPN | Producer's SSN | Course Title | Course ID | Date Course Completed | State Insurance Credit Requested | Status of CE Credit

Please let us know if you have feedback on how to make this guide more useful.

For any additional questions, comments or requests for changes and enhancements, please contact your RegEd Account Manager.