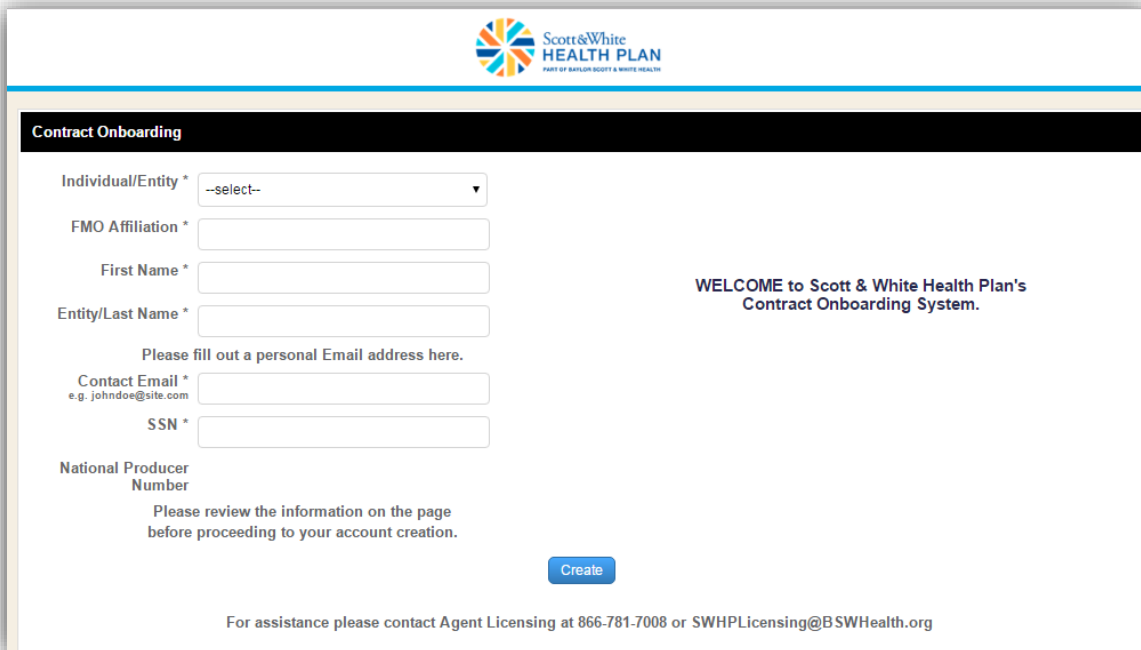


Direct Agent/Agency Electronic Appointment Onboarding Process

Agents requesting appointment with Scott and White Health Plan (SWHP) and FirstCare Health Plans (FirstCare) should access our [Onboarding link](#) to start the process.

Access the Onboarding link and enter the appropriate information: [SWHP Agent Onboarding](#)

- **Individual/Entity:** Select “Individual” for an agent or “Entity” for an agency.
- **FMO Affiliation:** Defaults to None. This field does not apply to independent agents. If you are affiliated with an FMO, please contact us at 866-781-7008.
- **First Name:** Enter the agent’s First Name. (This is for agents, not agencies.)
- **Entity/Last Name:** Enter the agent’s Last Name. (This is for agents, not agencies.)
 - **Entity/Last Name:** Enter the agency’s name as it is on file with TDI. (This is for agencies only.)
- **Contact Email:** Must be a unique email for the agent to receive their login information.
- **SSN:** Enter the agent’s Social Security Number then hit the tab key.
- **FEIN:** Enter the agency’s Federal Employer Identification Number then hit the tab key.
- **National Producer Number** will automatically populate once the SSN or FEIN is entered. (Please verify NPN is correct.)
- Click **Create** to create a login that will be emailed to the agent to complete their onboarding packet.



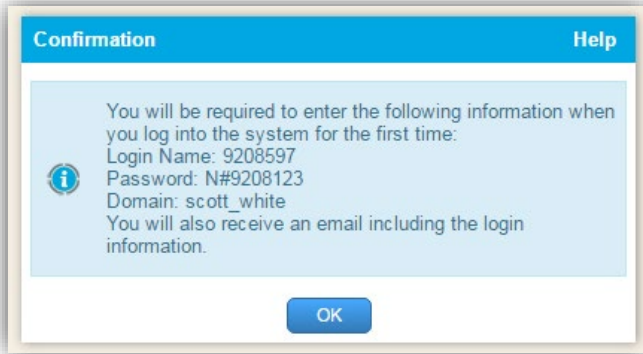
The screenshot shows the 'Contract Onboarding' web form. At the top left is the Scott & White Health Plan logo. The form contains the following fields and instructions:

- Individual/Entity ***: A dropdown menu with "--select--" as the current selection.
- FMO Affiliation ***: An empty text input field.
- First Name ***: An empty text input field.
- Entity/Last Name ***: An empty text input field.
- Contact Email ***: An empty text input field with the instruction "Please fill out a personal Email address here." and an example "e.g. johndoe@site.com".
- SSN ***: An empty text input field.
- National Producer Number**: A label with no input field.

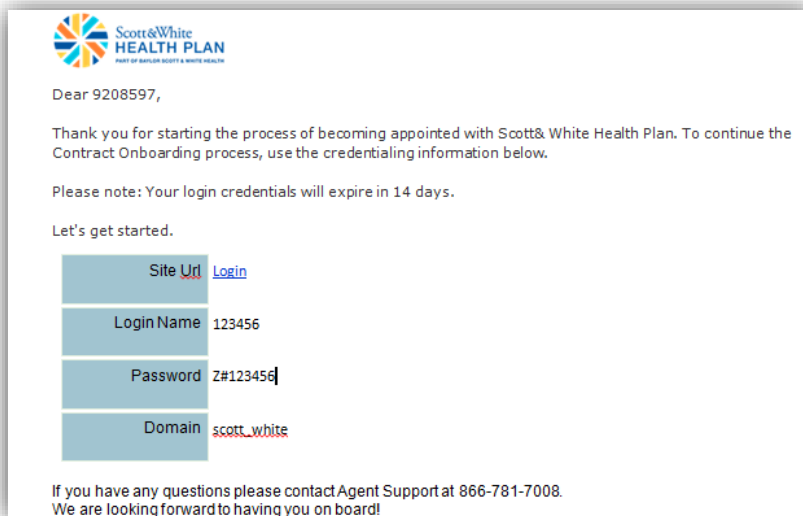
Below the fields, there is a blue button labeled "Create". A message on the right side of the form reads: "WELCOME to Scott & White Health Plan's Contract Onboarding System." At the bottom, there is contact information: "For assistance please contact Agent Licensing at 866-781-7008 or SWHPLicensing@BSWHealth.org".

1. An informational-only pop-up window will show. Select **OK**.

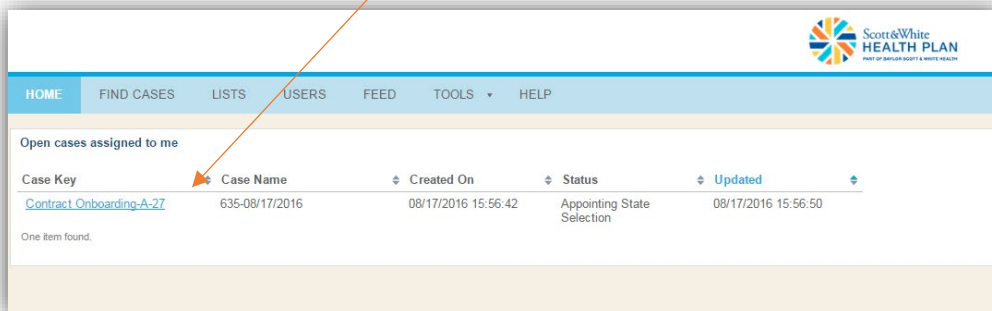
An email with personalized login information will be sent to the agent or agency from ScottWhite@Onboarding.com. (PLEASE DO NOT RESPOND to this email; instead, direct all questions to SWHP Agent Support at SWHPLicensing@BSWHealth.org or 866-781-7008.)



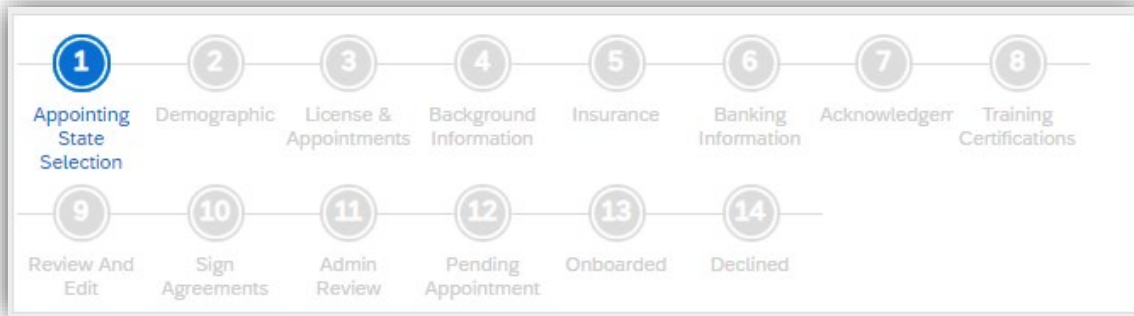
2. The email recipient entered on the creation screen will receive a Login email. Here's an example:



3. Once logged in, the agent will see a "Case" has been created. The Case Name will be the NPN and the date created.
4. Agents will need to click on the **Case Key** ([Onboarding Link](#)) to continue the contract appointment process.



5. The next steps for the agent/agencies are bulleted below. Each agent will start at the “Appointing State Selection” and continue through “Sign Agreements” for submission.



- **Appointing State Selection:** Attest to having a license with the Texas Department of Insurance (TDI).
 - If the user does not have a valid “Life, Accidental, Health and HMO” license with TDI, they cannot move forward.
 - **Demographic:** Validate contact information.
 - **License & Appointment:** Select the line of business(es) to sell and market products.
 - **Background Information:** Answer questions and applicable supporting information.
 - **Insurance:** Error & Omissions Insurance information and declaration page upload.
 - **Banking Information:** Information about where to pay commissions.
 - **Acknowledgement:** Review and electronically sign acknowledgement before continuing.
 - **Training Certifications:** For Medicare only; attach a copy of your current AHIP certificate and complete training requirements.
 - **Review And Edit:** Review and edit information before continuing.
 - **Sign Agreements:** Review and e-sign each DocuSign document.
 - **Submit** to Admin Review for SWHP Licensing Team.
6. Once all steps have been completed, our licensing admin will review for completeness and request any applicable missing information. If the Onboarding request is complete without missing information, a TDI request for appointment will be sent.

Once appointed, system setup will be processed. This process normally takes about 3-7 business days from submission for SWHP appointments. FirstCare appointments take about 7-14 business days from receipt of the TDI fee.

COMMISSION PAYMENTS

Commissions for the policies sold by appointed agents are paid based on the schedule in the contract.

Questions? Please contact us at SWHPLicensing@BSWHealth.org or 866-781-7008.