



LEARNING
CENTER FOR
BUSINESS
EXCELLENCE



Agent Onboarding Process



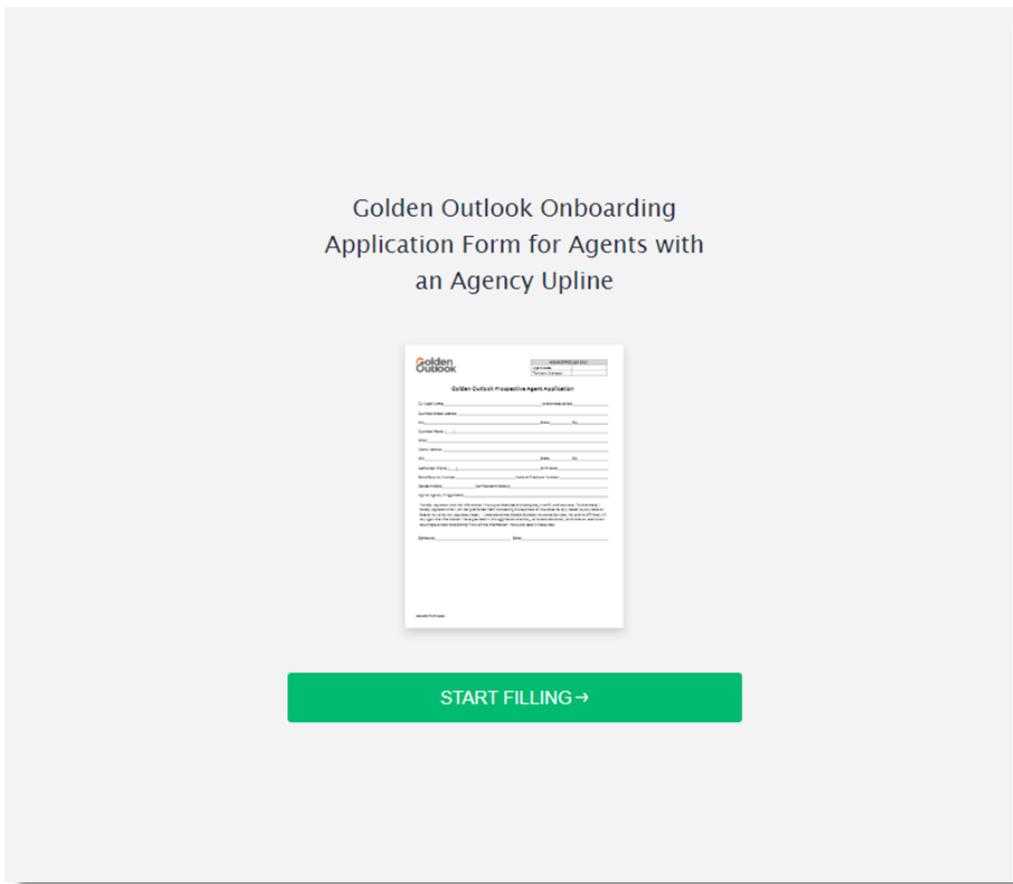


Getting Started

1. As an agent who reports to an agency, you will receive an email from your agency upline with a link to complete an onboarding application with Golden Outlook Insurance Agency

Completing the Online Onboarding Packet

2. Once the email is received, select the link in the email
3. You will be redirected to the following page
4. Select the Start Filling button





5. The Golden Outlook Prospective Agent Application page will display
6. The following fields will be pre-populated on the form and cannot be changed
 - A. Territory Manager Name
 - B. Upline Agency Name
 - C. Upline Agent Code will be pre-populated with
7. Complete all questions on this page
8. All fields with an asterisk are required



Golden Outlook Prospective Agent Application

Territory Manager Name

Name *

<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>First Name</small>	<small>Middle Name</small>	<small>Last Name</small>

Golden Outlook Prospective Agent Application

Full Legal Name *

I prefer to be called

Business Address *

Street Address

<input type="text"/>	<input type="text" value="Please Select"/>
<small>City</small>	<small>State</small>

Zip Code



9. If there is an error on the page, you will be able to see where the error is occurring on the page by selecting the See Errors button at the top of the page, the field with the error will be highlighted in red

There are **15** errors in this page. Please correct them before moving on. [See Errors](#)



Golden Outlook Prospective Agent Application

Territory Manager Name

Name *

<input type="text" value="Test Agent Name"/>	<input type="text"/>	<input type="text"/>
First Name	Middle Name	Last Name

This field is required.

Golden Outlook Prospective Agent Application

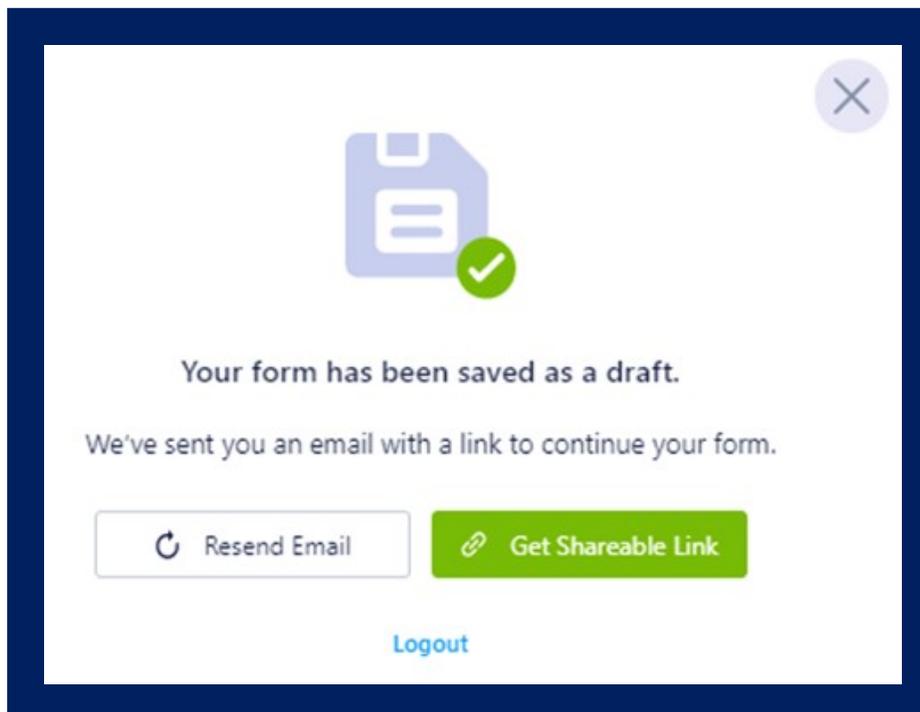


10. Once complete, select the Next button at the bottom of the page to navigate to the next page of the onboarding application packet

A. Note: If you are not able to complete the application, you have the option to save the application by selecting the SAVE button at the bottom of each page.



B. If you select the Save button, you will receive the following message. You will receive an email with a link to continue the application once you are ready to continue. You can also request Get Sharable link and use this link when you are ready to continue the application. All changes made thus far to the application will be saved.





Carrier Appointment Request

11. The purpose of the carrier appointment page is to request appointment with any of the carriers listed on this page that you are NOT currently appointed with. You will only be allowed to get appointed with the carriers that your upline agency is appointed with. If you are interested in getting appointed with any carrier not listed on this page, please contact your upline agency or agency's assigned territory manager.
12. Select all carriers on the page you would like to get appointed with. Once your onboarding is complete, you will receive links via email to complete applications to contract with the carriers you selected on this page



Carrier Appointment Request

Please select each carrier that you are requesting an initial appointment with. Once onboarded with Golden Outlook Insurance Agency, an appointment request will be submitted to the carrier(s) if your upline agency is currently onboarded with the carrier.

Carrier Appointment Initial Request

<input type="checkbox"/> Aetna Health and Life Co, Aetna Health Insurance Company, Accendo, American Continental, Continental Life - ACC, AHLC, AHIC, ACI, CLI	<input type="checkbox"/> Aetna-Medicare - ATNMC	<input type="checkbox"/> Alignment Medicare - ALIGNM
<input type="checkbox"/> America's First Choice Medicare - AFCHM	<input type="checkbox"/> Anthem Blue Cross and Blue Shield Inc - ATHEM	<input type="checkbox"/> Anthem Medicare - ATHMM
<input type="checkbox"/> Amerigroup Medicare - AMERM	<input type="checkbox"/> Bright Health Medicare - BHPM	<input type="checkbox"/> Bright Health Plan - BHP
<input type="checkbox"/> CareFirst Medicare - CARFM	<input type="checkbox"/> Centene Medicare - CENTM	<input type="checkbox"/> Cigna Medicare - CIGNM
<input type="checkbox"/> Cigna Supplemental Benefits - CIGSB	<input type="checkbox"/> Clear Spring Health Medicare - CHSM	<input type="checkbox"/> Clover Health Medicare - CLHM
<input type="checkbox"/> Humana Insur Co - Medicare - HUMED	<input type="checkbox"/> Inter Valley Health Medicare - INVLM	<input type="checkbox"/> Kaiser Medicare - KMCR
<input type="checkbox"/> Kaiser Mid Atlantic Medicare - KPMAM	<input type="checkbox"/> LA Care - LACAM	<input type="checkbox"/> Medical Mutual Medicare - MMM
<input type="checkbox"/> Molina Medicare - MOLM	<input type="checkbox"/> Scan Medicare - SCANM	<input type="checkbox"/> Ultimate Health Plans - ULHPM
<input type="checkbox"/> United Individual ACA - UIACA	<input type="checkbox"/> UnitedHealthcare Medicare - UHCM	<input type="checkbox"/> WellCare Medicare - WELLM



Assignment of Commissions Page

13. The purpose of the assignment of commission page is to identify how you would like to assign your personal production commissions (as a writing agent).
14. If your agency does not allow Golden Outlook to pay their downline agent's commissions directly to the agent, you will not have an option to assign your writing agent commissions to yourself (social security) or your DBA.
15. The Assignment of Commission page will auto populate with your upline Agency's name.



Assignment of Commissions

If and when Golden Outlook Insurance Services, Inc. ("Golden Outlook") owes me compensation because I have sold or secured the sale of insurance products of Golden Outlook and the carriers for which it does business, or for any other reason, I (the undersigned "Assignor") do not wish to receive that compensation, but instead assign it to, and direct Golden Outlook to pay it to, the person or entity listed below as Assignee:

Writing Agent Commission Assignment

Your commissions are assigned to your personal social security number. If you want to assign your commission to any other person or entity, select one of the options below.

Agency (Contracted Entity listed above)

Other (Example personal entity or your DBA)

Assignee Name (person or entity to be paid)

Test Agency 33



16. If your agency allows Golden Outlook to pay their downline agents commissions directly to the agent, (multiple check), you will have the option to assign your writing agency commissions to your personal DBA (using your DBA's Tax ID) or social security number.



Assignment of Commissions

If and when Golden Outlook Insurance Services, Inc. ("Golden Outlook") owes me compensation because I have sold or secured the sale of insurance products of Golden Outlook and the carriers for which it does business, or for any other reason, I (the undersigned "Assignor") do not wish to receive that compensation, but instead assign it to, and direct Golden Outlook to pay it to, the person or entity listed below as Assignee:

Writing Agent Commission Assignment

Your commissions are assigned to your personal social security number. If you want to assign your commission to any other person or entity, select one of the options below.

- Agency (Contracted Entity listed above)
- Other (Example personal entity or your DBA)

Please fill out the following if assigning to someone other than your agency or yourself

Assignee Name (person or entity to be paid) *

Test Agency DBA



17. If you select the other option, you must enter all the required fields (as noted with an asterisk)

The Social Security or Tax ID Numbers entered do not match. Please re-enter both numbers.

Assignee NPN *

Assignee Address *

Street Address

City State

Zip Code

Assignee Phone Number *



18. As the assignor, you, must sign and enter your in the assignor signature fields. The other fields are pre-populated with your information.

Assignor Signature *

Sign Here 

Date *

MM-DD-YYYY 

Date

Assignor Printed Name *

Do not enter dashes or hyphen

Assignor Social Security/Tax ID Number *

Do not enter dashes or hyphen

Re-enter Assignor Social Security/Tax ID Number *



Agent Agreement

19. This is the agent contract with Golden Outlook Insurance Agency.
20. You should read all sections of the agent contract. Once you have read each section of the agent agreement, you should sign the contract. The contract date will auto populate.
21. Once you are fully onboarded, you will receive an executed copy of this agreement.

AGENT AGREEMENT

This Agent Agreement ("Agreement") is entered into, by and between Golden Outlook Insurance Services, Inc., a California corporation, on behalf of itself and its affiliates ("Golden Outlook") and the undersigned agent("Agent"). Golden Outlook and Agent may be referred to in this Agreement collectively as "the parties" or separately as a "party." In consideration of the mutual covenants and agreements contained herein, the parties agree as follows:

1. Responsibilities of Agent

Agent Signature *

Sign Here

Clear

Name *

Date *

MM/DD/YYYY

Date

Back

Save

Next



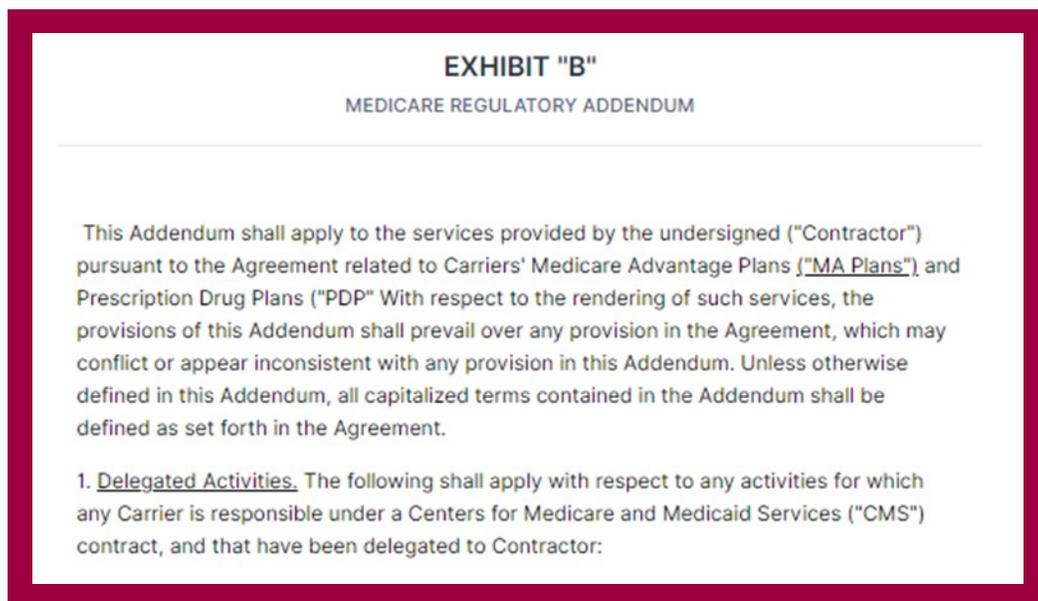
Exhibit “A” - Business Associate Agreement (BAA)

22. You should read each page of the Business Associate Agreement. There are no fields to complete for the BAA



Exhibit “B” - Medicare Regulatory Addendum

23. You should read each page of the Medicare Regulatory Addendum (MRA). There are no fields to complete for the MRA





The Background Check Disclosure and Authorization

24. By completing this form, you give Golden Outlook Insurance Agency authorization to perform a sanction check on you. A sanctions check validates that the agent is eligible to sell Medicare per CMS guidelines.
25. Golden Outlook Insurance Agency is unable to onboard any agent who does not pass the CMS Medicare sanctions check
26. Please sign this page in the signature field. The remaining fields on this page are pre-populated

The screenshot shows a web form titled "Background Check Disclosure and Authorization" from Golden Outlook. The form includes a "Disclosure" section with text explaining the purpose of the background check. Below this, there are three required fields: "Signature", "Date Signed", and "Printed Name". The "Signature" field contains a placeholder signature and a "Clear" button. The "Date Signed" field is a date picker showing "MM-DD-YYYY". The "Printed Name" field is an empty text box. At the bottom of the form, there are three buttons: "Back", "Save", and "Next".



The Background Check Disclosure and Authorization Form

27. If you reside in California, Minnesota, or Oklahoma, you can request a copy of your CMS sanctions check results. If you check the circle, a copy of the sanctions results will be sent to your email address
28. All pages of the onboarding application are now complete!
29. You can now select the Preview PDF button at the bottom of the page to preview each page of the application.

Background Check Disclosure and Authorization

Notice for California, Minnesota or Oklahoma residents:

By checking this box, I request to receive a free copy of any consumer report or investigative consumer report ordered

Notice to California Residents:

Under section 1786.22 of the California Civil Code, you may view the file maintained on you by the consumer reporting agency used by Golden Outlook during normal business hours. You may also obtain a copy of this file, either in person or by mail, by submitting proper identification and paying the costs of duplication services. You may also receive a summary of the file by telephone by being able to provide adequate identification as to allow the consumer reporting agency used by Golden Outlook to determine with reasonable certainty that you are the subject of the consumer report or investigative consumer report. The consumer reporting agency is required to have personnel available to explain your file to you and must explain to you any coded information appearing in your file. If you appear in person, another person of your choice may accompany you, provided that this additional person furnishes proper identification.

Back**Preview PDF**SaveSubmit



30. Copy of the PDF available for Preview

Golden Outlook

HOME OFFICE USE ONLY	
Agent Code	
Territory Manager	Nick Gasdia

Golden Outlook Prospective Agent Application

Full Legal Name Test Agent Name test I prefer to be called: Test

Business Street Address 1212 Fake Street

City Ft Worth State Texas Zip 76177

Business Phone () 111 111-1111

Email agentname@yahoo.com

Home Address 1212 Fake Street

City Ft Worth State Texas Zip 76177

Home/Cell Phone () 222 222-2222 CA Birth Date 02/11/1973

31. If you see any errors while previewing the completed form, you can select the back button and correct any answers (except for the pre-populated answers)

32. After reviewing the application, you can select the Back to Form button



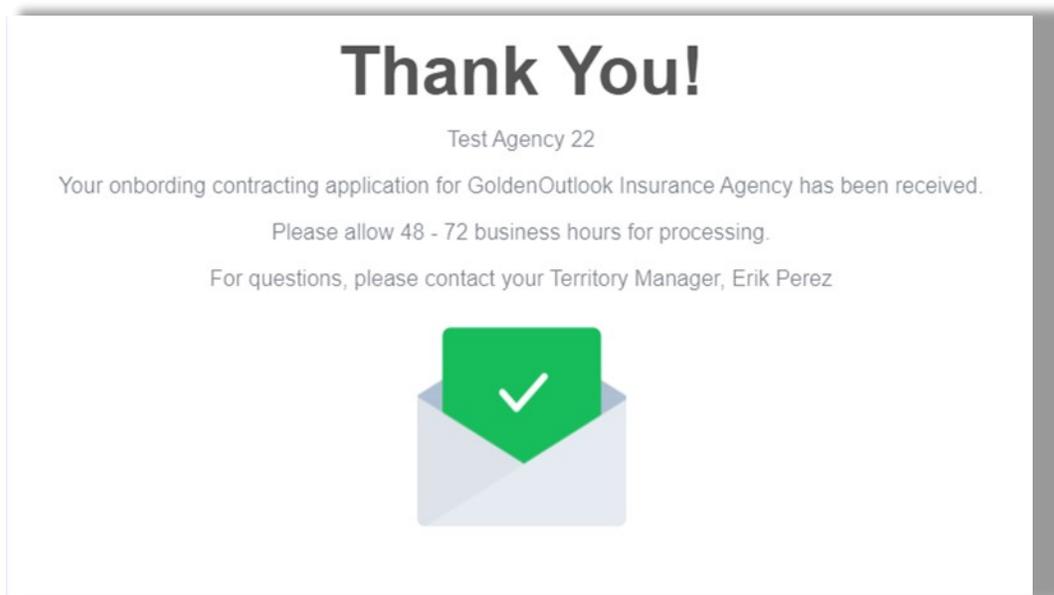


33. Once complete, you can select the Submit button

information appearing in your file. If you appear in person, another person of your choice may accompany you, provided that this additional person furnishes proper identification.

Back Preview PDF Save **Submit**

34. Then you will receive the following message





35. Note: You may receive a captcha message BEFORE receiving Thank You page.

36. You must answer the captcha questions to continue. Not doing so will cause the application packet to NOT SUBMIT.

The image displays a two-step captcha verification process. The first step is a simple checkbox labeled "I am human" which is highlighted with a red border. To its right is the hCaptcha logo and a "Submit Form" button. The second step is a more complex image-based captcha. It features a teal header with the instruction "Please click each image containing a boat" and a plus sign icon. Below the header is a grid of nine images: a large ship, a small boat with people, a train, a speedboat, a small plane, a yacht, a jet airplane, a bicycle, and a bus. A "Skip" button is located at the bottom right of the image grid. Below the grid is a "Submit Form" button highlighted with an orange border.



- 37. You will receive an email from the Golden Outlook confirming that we received the application
- 38. The email will come from Golden Outlook Insurance Agency



Golden Outlook Insurance Agency
<https://www.jotform.com/upload/HMSupOps/form_files/image_61f0664c0ae55.png>

Moss, Tangw... We have received your subm
Golden

- 39. Included in the email is a copy of the completed application.
- 40. For questions, please contact your agency's contracting team.

We have received your response for Golden Outlook Agent (agent of an agency) Multi Check Contract

 Golden Outlook Insurance Agency <noreply@jotform.com>
To: Moss, Tangwan

External Email

 5221409077713436398-Golden-Outlook-Agent-agent-of-an-agency-Multi-Check-Contract.pdf
801 KB

 Golden Outlook Agent (agent of an agency) Multi Check Contract

Thank you for your completing the Agent Onboarding application for Golden Outlook Insurance Agency. Attached is a copy of the application you completed online.

We look forward to partnering with you in the future. Please allow 2 to 3 business days to process your application.

Once you are onboarded with Golden Outlook Insurance Agency you will receive the following:

1. A welcome letter that contains your agent code along with instructions on how to access our broker portal to setup your banking information to receive commission payments via EFT
2. An executed contract

For questions regarding the onboarding process, please contact Wisconsin Advantage LLC or Nick Gasdia, your Golden Outlook Insurance Agency territory manager.

Thank you,

Golden Outlook Insurance Agency





Please follow [THIS LINK](#) to submit your information to Golden Outlook Insurance Agency through Fabian FMO. Once you complete and submit the information, you should receive a follow-up email from Golden Outlook within 3 business days.

If you have any questions, please email us at info@fabianfmo.com or call us at (863) 274-5555.