

# RegEd

## ATP Producer

### Getting Started Guide

## Annuities Training Platform Getting Started Guide for Producers

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

- ... Provides the ability for producers to meet multiple carrier requirements on one platform. RegEd's Annuity Training Platform makes it easy for producers to register and take the necessary state suitability and carrier-specific product training courses.
- ... Is the one place where distributors can see an agent's complete compliance profile for annuities training. This includes both the state suitability requirements and carrier-specific product training.
- ... Ensures producer 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.
- ... Already has several of the leading carriers and their producer populations participating on the platform.

Here is how producers can get started:

### Producer Registration

- 1) Go to <https://secure.reged.com/TrainingPlatform/>.
- 2) Select **"Sign Up"** in the top right hand corner.

The screenshot shows the RegEd website interface. At the top, there is a navigation bar with links for 'TRAINING PLATFORM', 'RULES AND REGULATIONS', 'NEWS', 'CONTACT US', and 'ABOUT US'. Below this, a central banner reads 'Welcome to the RegEd and IRI Annuity Training Platform, the Industry's Only One-Stop Solution for Insurers, Distributors and Producers'. To the left, a 'Participating Carriers' list includes companies like Allianz Life Insurance Company of North America, American National Insurance Company, AXA Equitable, Everence, The Hartford, Lincoln National Life, Nationwide Financial Services, Pacific Life Insurance Company, The Prudential Insurance Company of America, Security Benefit Life Insurance Company, Sun Life Financial, and Transamerica Life Insurance Company. In the center, a map of the United States highlights several states in purple. To the right, a 'Producers Get Started' box contains a three-step process: 1. Register online and create a profile, 2. Complete your state-mandated annuity training, and 3. Complete Carrier-specific courses as they are assigned to you. Below this, there is a 'News' section with headlines such as 'Indiana Approves RegEd's Annuity Suitability Course', 'North Dakota Approves RegEd's Annuity Suitability Course', and 'Maryland Approves RegEd's Annuity Suitability Course'. At the bottom of the page, there is a link to 'Download our FAQ here.' and contact information for producers and carriers.

### 3) Complete the registration form.

**RegEd**

Create Profile > Payment Information License Information

#### Annuities Training Platform Sign Up

**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:

\*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

**Terms of Service**

I accept the [Terms of Service](#) and site usage requirements

\* Denotes required field

### 4) Indicate the state(s) where you sell or will be selling an annuity product and supply the required information.

**IRI RegEd**

#### Annuities State Suitability Product Training

**Manage Annuities Product Training Requirements**

Please indicate the state(s) where you sell or plan to sell annuity products:

Delete?	State	Resident?
X	Select a State <input type="text"/>	<input type="checkbox"/>

## Producer Status: State Suitability Training

- 1) In order to access your state suitability training (i.e. the 4-hour state requirement, select “**Order Course**”.

The screenshot shows the 'Producer Status' page in the RegEd system. On the left is a navigation menu with options: Welcome Allison Harris, Producer Status (selected), Enter Product Code, Optional Insurance CE, My Account, and My Certificates. The main content area is titled 'Producer Status' and includes a 'Print' button. Below this is a section for 'Annuities State Suitability Compliance Summary' which contains a table:

State	Resident?	Requirement Met?	Course Status
<a href="#">Iowa</a>	Yes	No	<input type="button" value="Order Course"/>
<a href="#">Ohio</a>	No	No	<input type="button" value="Order Course"/>
<a href="#">Wisconsin</a>	No	No	<input type="button" value="Order Course"/>

Below the table is a button: . Further down is a section for 'Carrier-Specific Product Training' with a table:

Requirement	Completion Date	Requirement Status
You currently have no carrier-specific product training assigned to you. If you need to complete product training, please contact your carrier(s) to obtain access.		

- 2) Indicate whether you would like to complete your state suitability training course **with or without** Continuing Education (CE) credit. NOTE: many states *do not* allow post-ordering of CE credit once a course has been completed.

The screenshot shows the 'Product Training & CE Options' page. It asks: 'Do you want to receive CE credit(s), where available, with your Product Training completion(s)?' There are two radio button options:
 

- I want to receive CE credit(s) with my Product Training completion(s)
- I DO NOT want to receive CE credit(s) with my Product Training completion(s)

 Below the options is a warning message: **Warning! Ordering CE after the course is completed is NOT allowed for most states.** At the bottom are two buttons:  and .

- 3) Select the course(s) and/or CE credit you wish to order and complete your order. To view which courses are reciprocal (i.e. these courses have been approved in the states listed by the participating carriers on the ATP platform) select the **hyperlink** next to “Annuities State Suitability Approved In:” section.

**Available Courses and CE Credit**

To receive credit you must select **Add** for the credits desired. If no credits appear, the courses you have completed or ordered are not approved for that state or professional designation. To review your completed order, select **Proceed**.

Search Titles Within List

Add Course	Credits	Course Rating	Price
<input type="checkbox"/> Add State or Professional Designation CE <input type="checkbox"/> NAIC Suitability in Annuity Transactions Model Regulation (390) Annuities State Suitability Approved In: <a href="#">IA, OH, WI</a> <input type="checkbox"/> CE Credit for Ohio Ohio State Fee	4 Annuity ClearCert Annuities Approved	- Advanced	\$0.00 \$15.00 \$4.00
<input type="checkbox"/> Suitability of Annuity Transactions as Required by the State Annuities State Suitability Approved In: <a href="#">IA, OH, WI</a> <input type="checkbox"/> CE Credit for Iowa Iowa State Fee	4 Annuity Products ClearCert Annuities Approved		\$0.00 \$15.00 \$4.00
<input type="checkbox"/> Suitability of Annuity Transactions as Required by the State Annuities State Suitability Approved In: <a href="#">IA, OH, WI</a> <input type="checkbox"/> CE Credit for Wisconsin* <b>This course must be ordered</b>	4 Annuity Suitability ClearCert Annuities Approved		\$0.00 \$15.00

[Bottom](#) [Top](#)

- 4) Once your order has been completed, select “**Go To Course**” to access the training.

**Welcome**  
Allison Harris

**Producer Status**

**Annuities State Suitability Compliance Summary**

State	Resident?	Requirement Met?	Course Status
<a href="#">Iowa</a>	Yes	No	<input type="button" value="Go to Course"/>
<a href="#">Ohio</a>	No	No	<input type="button" value="Go to Course"/>
<a href="#">Wisconsin</a>	No	No	<input type="button" value="Go to Course"/>

**Carrier-Specific Product Training**

Requirement	Completion Date	Requirement Status
You currently have no carrier-specific product training assigned to you. If you need to complete product training, please contact your carrier(s) to obtain access.		

- To update your product training requirements (i.e. add/remove states) select **Manage My State Suitability Requirements**.

## **Producer Status: Carrier-Specific Product Training**

- To access carrier-specific product training that has been assigned to you select **“Go To Requirement”** for the applicable training listed on Producer Status. NOTE: if you *do not* see a carrier’s product training assigned to you, please contact your carrier(s) in order to obtain access to the training(s).

The screenshot displays the RegEd interface for a user named Allison Harris. The page is titled "Producer Status" and includes a "Print" button. It is divided into two main sections: "Annuities State Suitability Compliance Summary" and "Carrier-Specific Product Training".

**Annuities State Suitability Compliance Summary**

State	Resident?	Requirement Met?	Course Status
<a href="#">Iowa</a>	Yes	No	<input type="button" value="Go to Course"/>
<a href="#">Ohio</a>	No	No	<input type="button" value="Go to Course"/>
<a href="#">Wisconsin</a>	No	No	<input type="button" value="Go to Course"/>

**Carrier-Specific Product Training**

Requirement	Completion Date	Requirement Status
<b>CARRIER 1 PRODUCT TRAINING</b>		
2010 Annual Compliance Meeting (ANN_ACM)		<input type="button" value="Go To Requirement"/>

- 2) To access carrier-specific product training **records of completion** select the training module from the left-hand navigation menu and select the **Course History** option in **My Courses**.

**My Courses**

Active Courses: **Course History**

You have completed the courses listed below. To print a record of successful completion, select the corresponding **Print Record** button. **Note:** The record of successful completion is not a state insurance, professional designation or product training certificate of completion.

You now have access to the study guide material after you have completed your online exam. When you select the **View Study Guide** button below, you will have access to a PDF of the study material for each course.

You may also order insurance or professional designation credit for courses you have already completed. If you would like to order insurance credit for any completed course listed below, please select the **Order Additional Insurance Credit** button.

To view/print the E-Cert for State CE Credits that have an E-Cert available, click the **View E-Cert** button to be taken to the E-Certs page.

Course Name	Course Status	Course Completion Date	Print Record / E-cert	Course Library
State or Professional Designation CE Status				

## Enter Product Code

- 1) If you have a product training code provided by your carrier, select **“Enter Product Code”** via the left-hand navigation menu and enter the product code provided. Once your product code has been supplied you will be able to access it via **Producer Status**.

**Welcome**  
Allison Harris

**Just-In-Time Product Training**

Please supply the Product Code provided by your carrier below.

After you supply the Product Code your assigned carrier-specific requirement(s) will appear on your Producer Status page to complete. If you do not complete the assigned carrier-specific requirement(s), you may come back and re-enter the Product Code provided at any time to access the requirement(s) again.

Your carrier will be notified of the status of your completion(s).

\*Product Code:

## Optional Insurance CE

- 1) To view the Optional Insurance CE courses select **“Optional Insurance CE”** via the left-hand navigation menu.

- 2) Select **“Proceed”** to complete additional courses available to you at a discounted rate.

**Optional Insurance CE**

RegEd's course library with more than 300 approved insurance courses is available to all participating producers at discounted rates. Courses are only \$6.00 and include a state certificate of completion. Course topics include:

- Ethics
- Long Term Care
- Life & Health
- Property & Casualty
- Adjuster
- Professional Designations
- ...and many more!

To access RegEd's vast library of training to meet your continuing education needs please select the Proceed button below.

If you have any questions, please contact RegEd Customer Support at 800.334.6322  
Monday through Friday, 8 am to 8 pm Eastern

[Proceed](#)

## My Certificates

- 1) To view CE certificates of completion that have been issued to you select **“My Certificates”**.

**My Certificates**

A paper certificate will be mailed to you. [Print certificate](#) [Request a paper certificate](#)

Please ensure your pop-up blocker is disabled when downloading your certificate.

[Download My Transcript](#) Page 1

Provider	License Type	State (Course #)	Course Name (Course ID)	Completion Date	Status	Certificate	Print Rules
You currently have no certificates to view or print.							

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