



Agent Contracting Instructions

SENIOR PRODUCTS

Noted below are specific instructions for each carrier's NEW appointment process. If you are requesting a TRANSFER, please contact the PPI Admin listed for transfer instructions.

LIFE & ANCILLARY

- CUL/Family Life:** Request a contract link from *Sarah* (sarahm@ppisales.info)
- Gerber Life:** Complete through our SuranceBay portal (see instructions pg. 2) – *Haley* (haleyp@ppisales.info)
- GTL:** Complete through our SuranceBay portal (see instructions pg. 2) – *Jenny* (jennyb@ppisales.info)
- Kemper:** Request a contract link from *Jenny* (jennyb@ppisales.info)
- Phoenix Life:** Complete through our SuranceBay portal (see instructions pg. 2) – This is a Just-In-Time Appointment. You will not receive a writing number until you have submitted your first piece of business to Phoenix Life. - *Haley*
- Royal Neighbors:** Complete through our SuranceBay portal (see instructions pg. 2) – *Jenny* (jennyb@ppisales.info)
- Standard Life & Casualty:** Complete through our SuranceBay portal (see instructions pg. 2) – *Jenny* (jennyb@ppisales.info)

MEDICARE ADVANTAGE

- Anthem:** Request PDF/Paper contract from *Anna* (annap@ppisales.info)
- BCBS of SC:** Complete through our SuranceBay portal (see instructions pg. 2) – *Terry B* (terryb@ppisales.info)
- Centene:** You will receive this by email from Centene Contracting - There are test/certifications that must be completed once the contract is submitted. You will not be able to sell until all the certifications are passed/completed. – *Anna* (annap@ppisales.info)
- Humana:** Request a link from *Anna* (annap@ppisales.info)
- United Healthcare/CIP:** Request a PDF/Paper contract from *Anna* (annap@ppisales.info) – There are tests/certifications that must be completed once the contract is submitted. You will not be able to sell until all the certifications are passed/completed.
- Wellcare:** Request a link from *Haley* (haleyp@ppisales.info) – There are tests/certifications that must be completed once the contract is submitted. You will not be able to sell until all the certifications are passed/completed.

MEDICARE SUPPLEMENT

- CSI Life:** Request a link from *Haley* (haleyp@ppisales.info) - This link will be sent to you by your DIRECT upline.
- Manhattan Life:** Request a link from *Haley* (haleyp@ppisales.info) - This link will be sent to you by your DIRECT upline. NOTE: This is a separate appointment from CUL.
- Mutual of Omaha:** Complete through our SuranceBay portal (see instructions pg. 2) – *Jenny* (jennyb@ppisales.info)



SURANCEBAY INSTRUCTIONS

Our PPI SuranceBay website* - <https://surelc.surancebay.com/sbweb/agency/347>

If this is your first time on our SuranceBay site, select “New User” and create a profile. Once your profile is complete, you can “Request Appointment” for the carriers you would like to represent.

***NOTE:** If you have previously set up a profile with SuranceBay through another FMO, you will need to create a NEW profile through the PPI portal above.

QUESTIONS?

For **CONTRACTING** related questions, contact our contracting team at 864-228-2635, or email the PPI Admin listed next to the carrier above.

For **MARKETING, SALES** or **PRODUCT** information, contact Ray Burr or Robert Nance:

Ray Burr, *Senior Market Director* (rayb@ppisales.info) – 803-609-1834

Robert Nance (robertn@ppisales.info) – 864-228-2635