



POWERING  
YOUR  
POSSIBLE.

---

# Onboarding and Self-Service

## Fact Sheet

(Fall Release Event 2024)

**Table of Contents**

<b>Introduction .....</b>	<b>2</b>
<i>Overview of Onboarding and Self-Service (OBSS).....</i>	<i>2</i>
<b>Sircon Network Features.....</b>	<b>2</b>
<i>Overview of network and Onboarding features.....</i>	<i>2</i>
<i>Onboarding Dashboard .....</i>	<i>3</i>
<i>View Producer Profile.....</i>	<i>4</i>
<b>Self-Service Features .....</b>	<b>6</b>
<i>Overview of Self-Service features.....</i>	<i>6</i>
<i>Contact Changes.....</i>	<i>6</i>
<i>Document Sharing .....</i>	<i>8</i>
<i>Language Preferences .....</i>	<i>9</i>
<i>View Self-Service Activities .....</i>	<i>10</i>
<b>Message to Our Customers.....</b>	<b>12</b>

---

## *Introduction*

---

### **Overview of Onboarding and Self-Service (OBSS)**

Onboarding and Self-Service is a set of features for carriers that gives the capability to onboard agents and agencies into a connected network and then provide them with self-service features.

As a carrier, you control what self-service features you provide to your network and to whom you provide them. Both you as a carrier and producers save time using the self-service options.

This document briefly explains the Onboarding and Self-Service features and then invites you to activate and use them to simplify your business. You become a “carrier of choice” because you provide helpful time-saving features to your connected producers.

---

## *Sircon Network Features*

---

### **Overview of network and Onboarding features**

The Sircon Network connects carriers, agents and agencies together using the following applications to provide controlled access to the network:

- **Producer Central**                      Carrier's onboarding and compliance solution.
- **Sircon for Agencies**                      Agency's portal to network and services.
- **Sircon for Individuals**                      Individual's portal to network and services.

Carriers create a network with producers by inviting them to connect to the carrier during the onboarding process. Each producer establishes a Sircon account on their respective application or links an existing account to the carrier.

Carriers can easily monitor their onboarding process and keep track of who is in their network.

Carriers invite producers to join their Sircon network through Producer Express requests, invitation links sent inside of shared documents, or sending an invitation from a producer's profile.

As a carrier, connect agents and agencies to your network to:

- Streamline communication
- Provide self-service access to view shared information and make requests

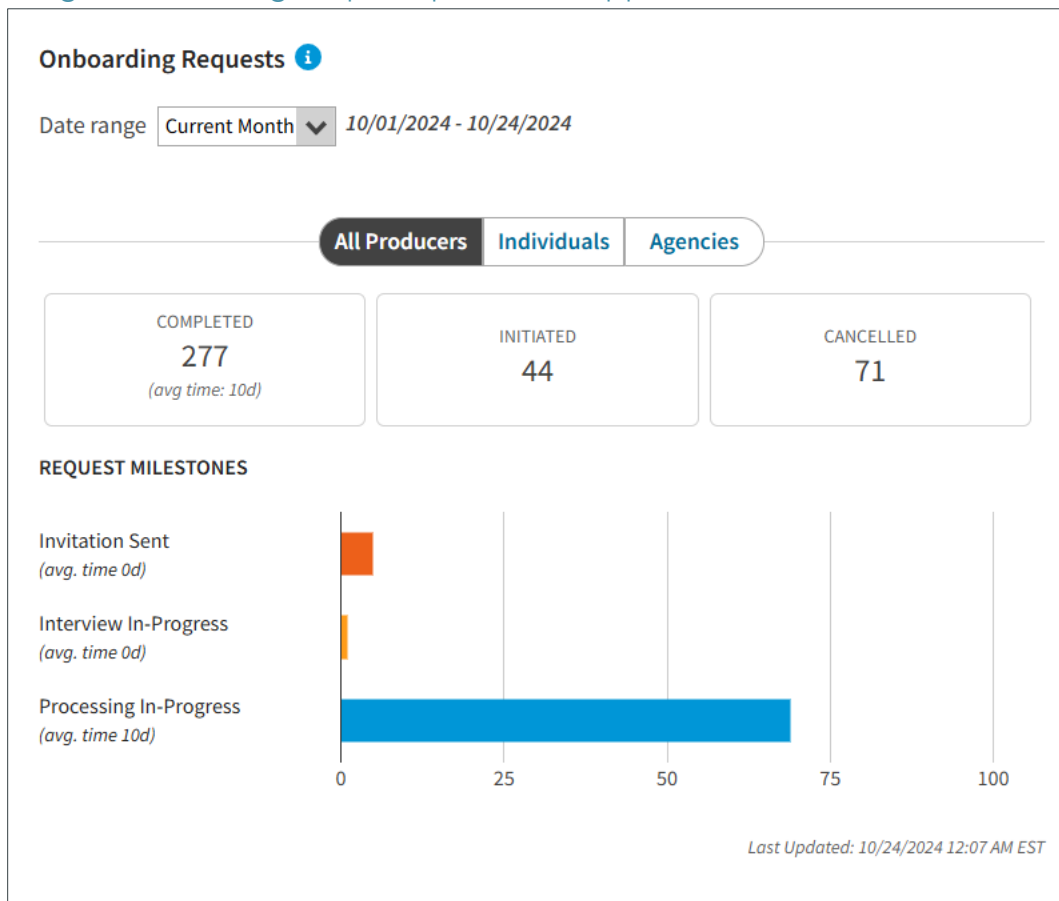
This document does not explain all the automation, customization, and integration capabilities of Producer Express technology, or the additional integration and onboarding options such as Salesforce Sircon Connect and DTCC onboarding. If you are curious to learn more about these options, please contact your Account Manager.

## Onboarding Dashboard

### FEATURE

The carrier uses the Onboarding Request dashboard to monitor the progress of onboarding for producers who were invited through Sircon Onboarding and Self-Service.

Image: Onboarding Requests panel as it appears in Producer Central Dashboard



## Section: Sircon Network Features

### Capabilities include:

- View summary counts of onboarding requests in a particular status
  - Initiated, Completed, Cancelled
- View summary counts of onboarding requests in a particular milestone (stage).
  - Invitation Sent, Interview in Progress, carrier Processing in Progress
- View average time a request remains within a status or milestone.

### Sample uses include:

- Monitor counts of onboarding requests in each status and milestone to determine if company is meeting their onboarding goals.
- Monitor counts and average time of requests over time to see if onboarding statistics improve, deteriorate or are the same over time.

### Configuration options:

- No configuration of display. However, Professional Services helps carriers set up the onboarding processing.

## BENEFITS

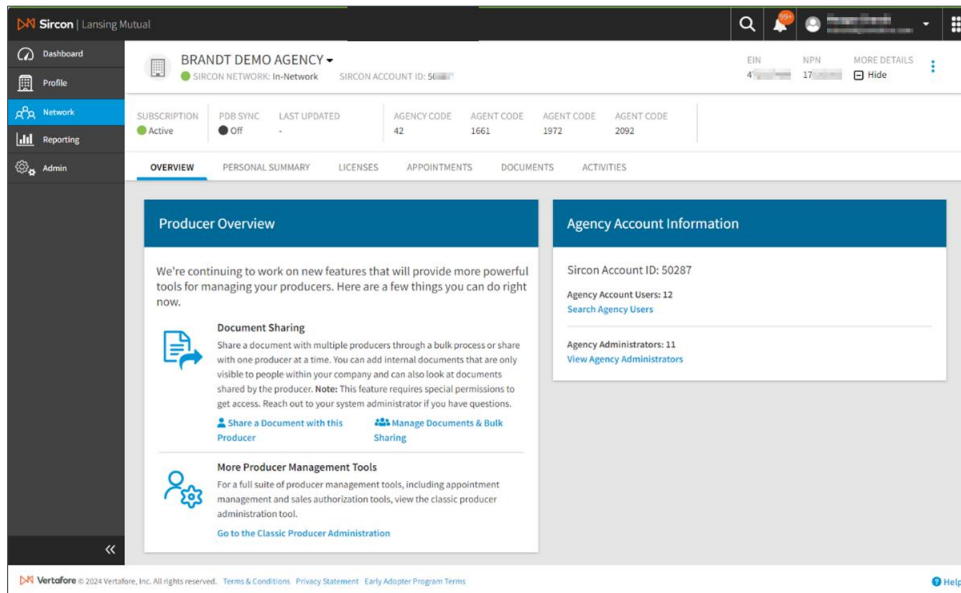
Carrier can easily monitor onboarding progress to see if they are meeting their goals and catch problems as they develop.

## **View Producer Profile**

### FEATURE

The Carrier views an agent or agency's profile and manages their network status from Producer Central.

Image: Producer Profile



### Capabilities include:

- Profile Header
  - View In-Network indicator, Sircon Account ID, EIN, NPN.
  - View Subscription status, PDB Synchronization status, and producer codes.
  - Carrier can invite producer to connect to their network if the producer has a Sircon account but is not yet onboarded with the carrier.
  - Carrier can unlink a producer's Sircon Account
- Overview tab
  - Share a document with a single producer or in bulk.
  - Search agency users and view agency administrators.
- Personal Summary tab
  - View language preferences.
- Licenses tab
  - View a listing of resident and non-resident licenses by state.
- Appointments tab
  - View appointments with underwriting companies the carrier owns and manages.
  - View appointments producer has with other carriers.
- Documents tab
  - View documents shared with a producer.

## Section: Self-Service Features

- Share a document directly with the producer or attach a document to the producer's profile that is only viewable by the carrier
- Activities tab
  - View an activity log of carrier-specific actions the producer performed using their Sircon account.
  - The application shows contact change and document sharing activities.

### Sample uses include:

- Carrier needs to know a producer's basic information, status in the network, and if they have PDB updates turned on.
- Carrier confirms a producer's licenses and appointments.
- Carrier communicates with producers and keeps internal documentation on the producer using the document sharing feature.
- Carrier views self-service activities performed by the producer.

### Configuration Options:

- Not applicable

## BENEFITS

Carriers can easily verify who is on their network, find information on them, communicate with them, and know what self-service activities they performed.

---

## ***Self-Service Features***

---

### **Overview of Self-Service features**

Self-Service features are services the carrier enables for an agent or agency. The agent or agency perform self-service actions without spending time contacting the carrier.

### **Contact Changes**

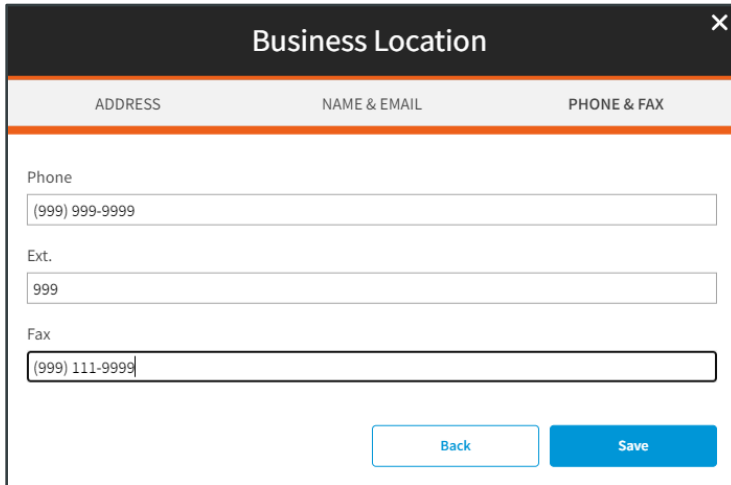
#### FEATURE

Individuals and Agencies use their Sircon applications to quickly update contact information that the carrier has on file for them. The carrier controls what contact information displays, what can be edited, and who can edit it.

The Contact change feature does not update contacts with the state and does not update the billing address.

## Section: Self-Service Features

Image: Sample showing editing contact information on file with a carrier



The screenshot shows a modal window titled "Business Location" with a close button (X) in the top right corner. Below the title bar is a header with three tabs: "ADDRESS", "NAME & EMAIL", and "PHONE & FAX". The "PHONE & FAX" tab is selected. The form contains three input fields: "Phone" with a placeholder "(999) 999-9999", "Ext." with a placeholder "999", and "Fax" with a placeholder "(999) 111-9999". At the bottom right of the form are two buttons: "Back" and "Save".

### Capabilities:

- Display contact information that carrier has on file for a producer.
  - Address, Email, and Phone
- Display External IDs, if permitted by carrier.
  - Examples: Writing codes, Producer Numbers.
- Notify a producer their contact information changed, for security reasons.

### Sample Use Cases:

- Producer moved and has a change of contact information that they must communicate to their carrier(s).
- Producer wants to view their Writing IDs.

### Configuration Options:

- Carrier uses Producer Rules to control what contact information is visible and can be edited.
- Carrier uses Producer Rules to control what groups of producers can view and edit their contact information.

### BENEFITS

Agents and agencies quickly update their contact information without contacting and waiting for a carrier to make the change. The carrier saves time because producers, not staff, perform the change.



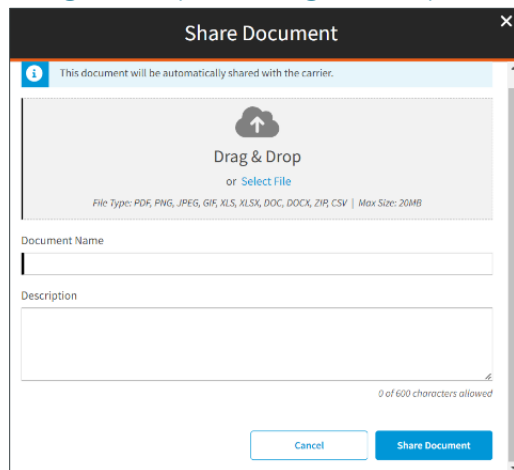
Section: Self-Service Features

## Document Sharing

### FEATURE

Producers share documents with the carrier.

Image: Sample dialog where producer shares document with connected carrier



A carrier shares documents with producers as a standard feature in Producer Central. However, activating Onboarding and Self-Service features unlocks the ability for producers to share documents with carriers.

### Capabilities:

- For Carriers – Standard Producer Central feature.
  - Carrier shares single or bulk documents with individuals and agencies
  - Carrier views list of all shared documents.
  - Carrier stores documents that are internal-only and relate to a producer.
- For Individuals and Agencies – Extended feature when using OBSS.
  - Individuals and agencies share documents with a connected carrier.
  - The application sends an in-app notification when a document is shared.
  - The application tracks document sharing in a producer's activities.
  - Producer can remove their own documents when no longer required.
  - Producer views list of all shared documents.

### Sample Use Cases:

- Carrier requests missing information from producers. Producer sends information using a document.

## Section: Self-Service Features

- Carriers send out bulk announcements to producers such as changes in contracts.
- Producer shares missing information with carrier using documents.
- Carrier gathers agent roster information from producers using documents.

### Configuration Options:

- Carrier uses Producer Rules to set sharing options and to decide who can share documents.

## BENEFITS

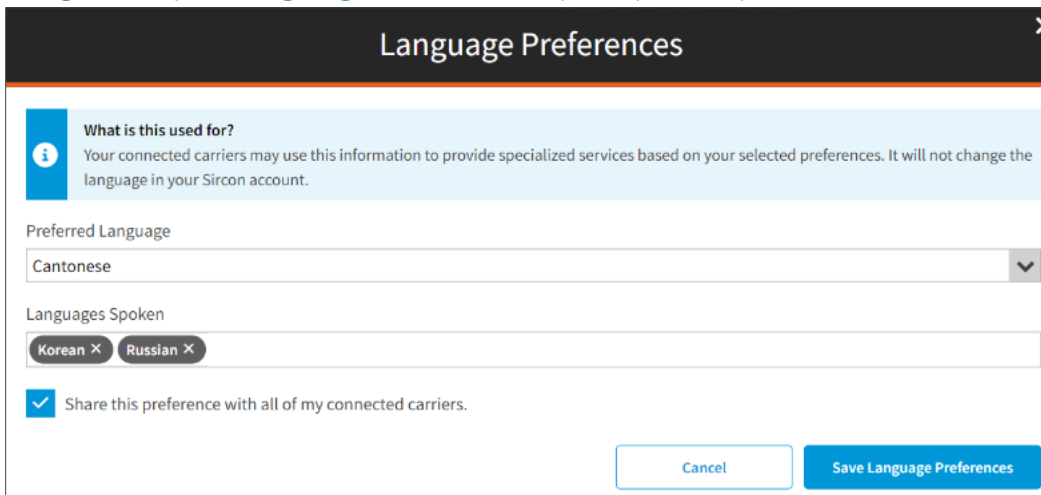
Carriers can quickly contact and exchange information with one or many producers simultaneously. Carriers can quickly onboard producers using document sharing. Producers can easily send documents that provide missing information the carrier needs.

## Language Preferences

### FEATURE

Producers set their language preferences during onboarding.

Image: Sample Language Preferences prompt to a producer.



### Capabilities:

- Producer sets desired language they speak.
- Producer sets language(s) they can read and write.
- View saved language preferences in the individual or agency profile.
- Carrier views and updates preferences as needed.
- Language selections include:

Section: Self-Service Features

- English, Spanish, French,
- Cantonese, Mandarin, Korean, Vietnamese
- Polish, Russian, Tagalog

Sample Use Cases:

- Producer only speaks one language well and needs the carrier to know that.
- Producer is multi-lingual, which is helpful for a carrier to know.
- Carrier wants to connect and communicate in the best manner with producers.

Configuration Options:

- Carrier uses Producer Rules to control language preferences.

BENEFITS

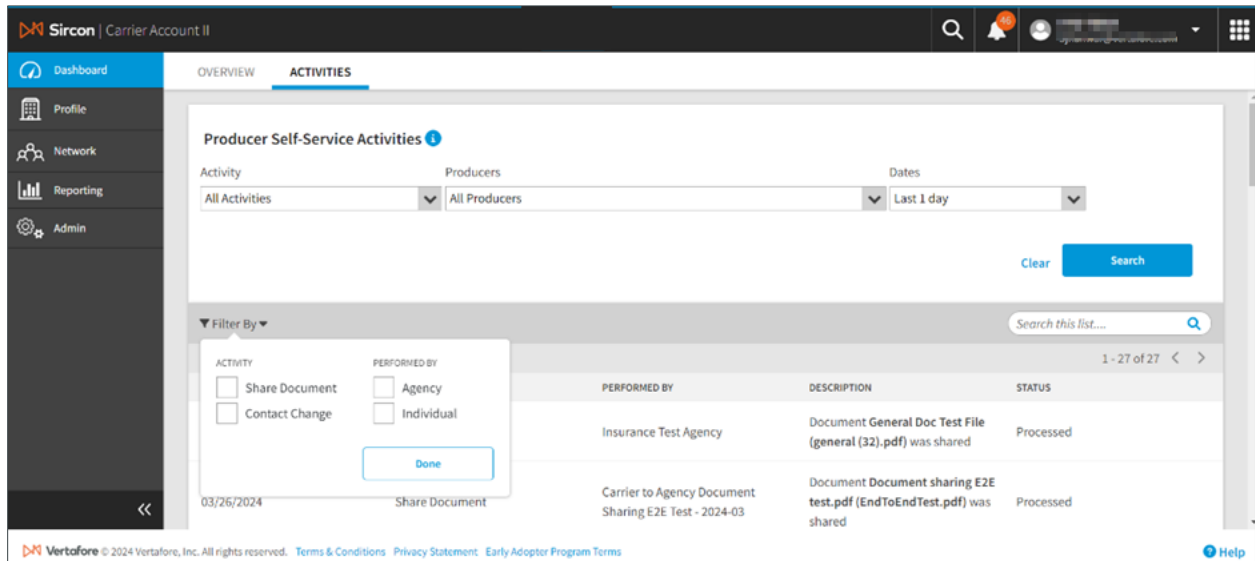
Carriers can work more effectively with producers by communicating in their preferred language. Finding multi-linguists can be an asset to the company.

**View Self-Service Activities**

FEATURE

Carriers view the self-service activities of all producers in their connected network in the Producer Central dashboard for activities.

Image: Activities tab in Producer Central



Capabilities:

- Search by activity type, producer type and date.
- Search for a specific producer by producer name, NPNs, EINs, and their External System IDs (ID you use to identify the producer in your systems).

### Section: Self-Service Features

- View self-service activities for all producers or a selected producer.
- Filter information by activity type and by Agency and Individual.
- Download an activity report that you can view in Excel.

### Sample Use Cases:

Carrier wants to see what self-service is being used and by whom.

### Configuration Options:

- Not applicable.

### BENEFITS

Carriers can quickly determine what self-service activities producers are using and the details of that self-service activity. For example: What contact changes were made? What documents were shared?

---

**Message to Our Customers**

---

In summary, Onboarding and Self-Service gives you the following abilities:

- Easily monitor the progress of onboarding.
- Easily monitor the self-service activities of producers.
- Know the language preferences of your producers.
- View a producer's profile and their connected network information.
- Control what self-service features are available and to whom.
- Give producers the ability to change their contact information.
- Give producers the ability to share documents with the carrier.

As a carrier, you benefit in the following ways:

- Better visibility to onboarding and self-service activities producers perform.
- Fewer phone calls
- Less manual processing resulting in better turnaround times on requests

And very importantly...

- Producers see you as a "carrier of choice" because of the services you provide.

To benefit from all these features, you must have Onboarding and Self-Service activated.

If you have not already done so, we warmly invite you to contact your Account Manager and discuss how to easily activate Onboarding and Self-Service in your account so you can begin enjoying the benefits and profit yourself and your producers.