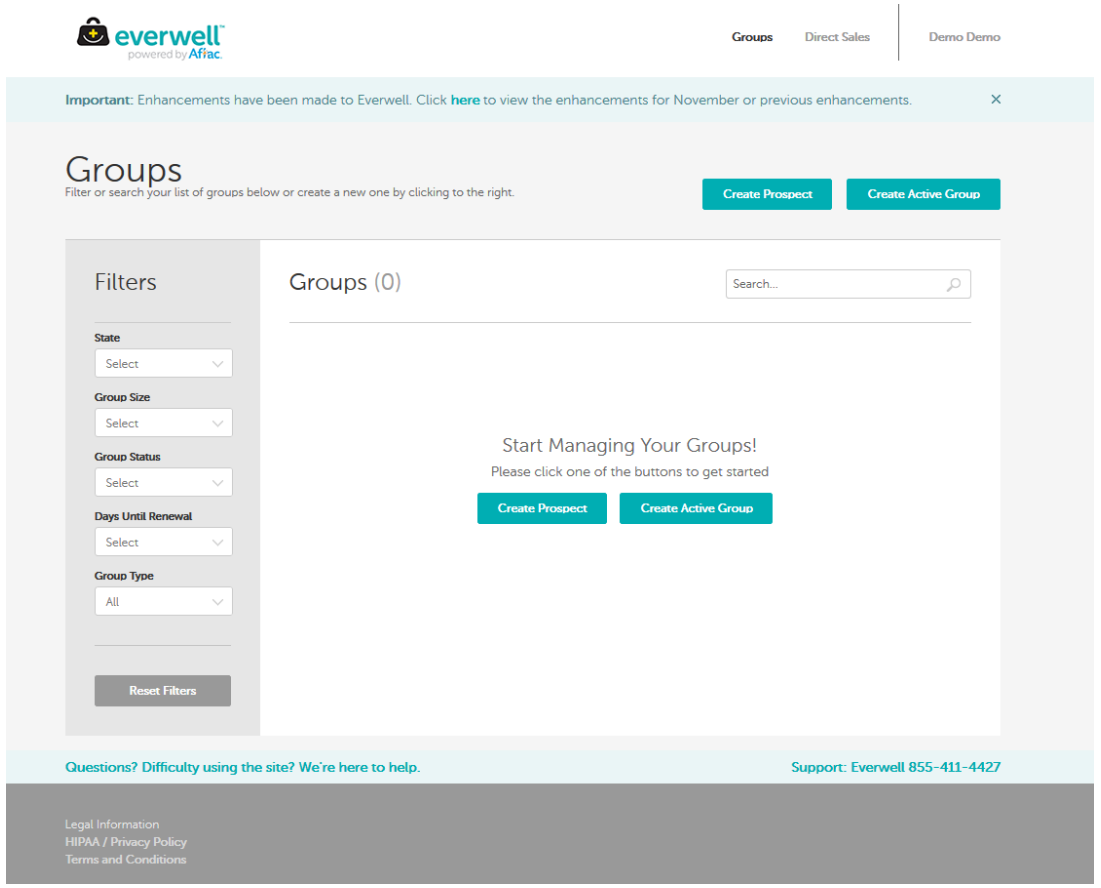
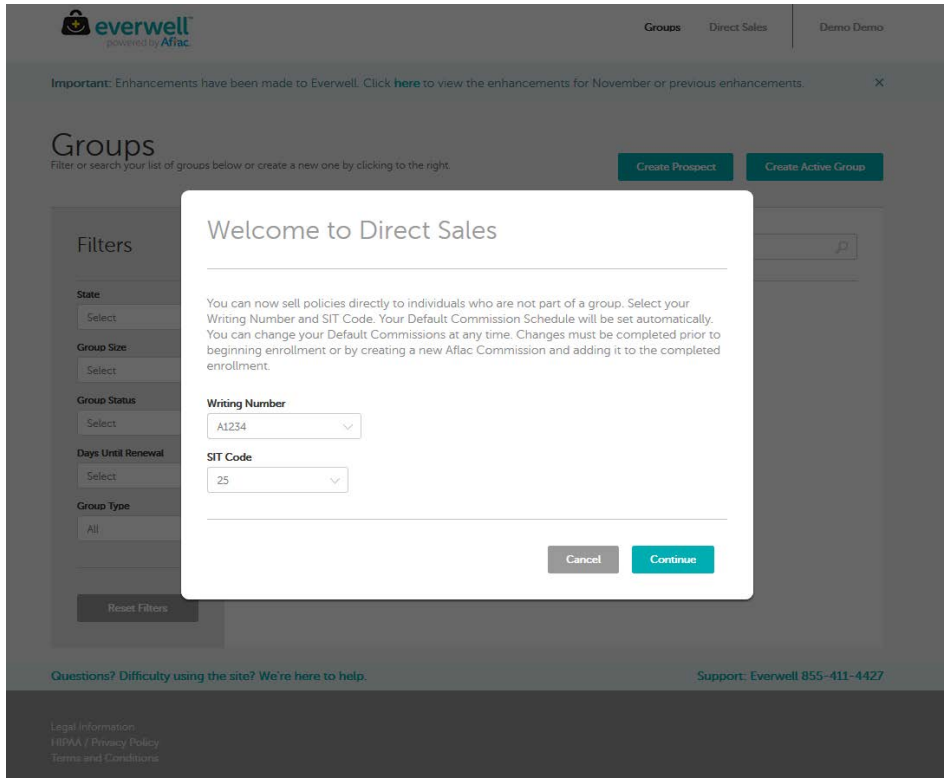
Agent Self-enrollment (00316 and 0BTM1)

- An agent can access the enrollment flow for account 00316 via their Direct Sales page
- If an agent has not set up their direct commissions already, this process will remain BAU

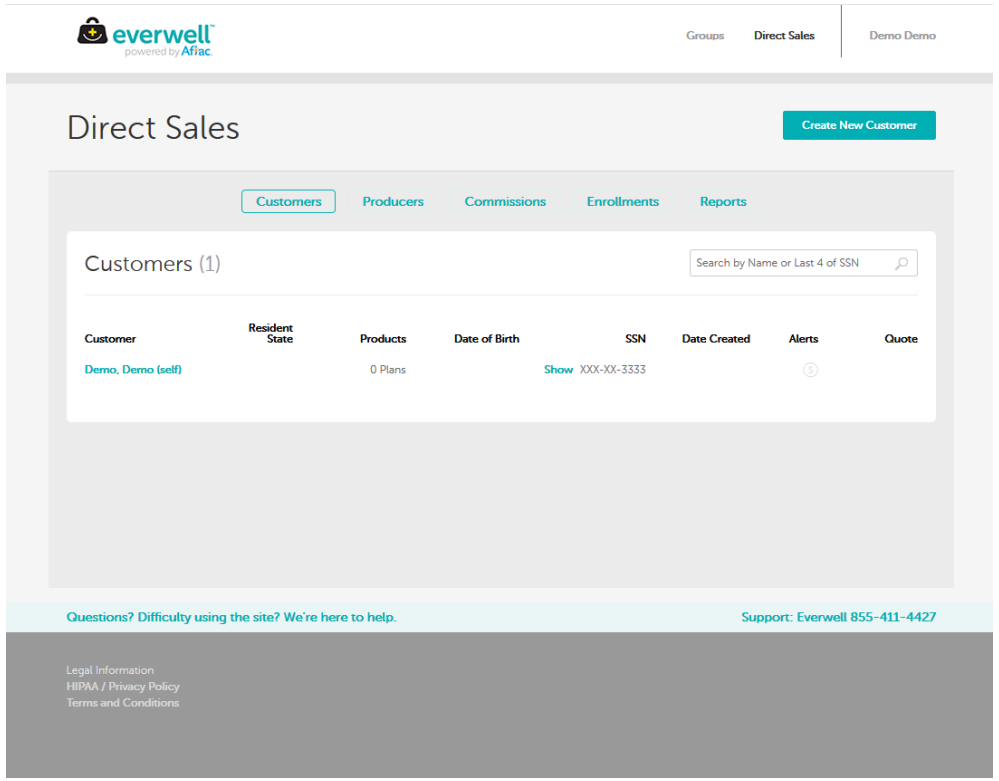


Agent Self-enrollment (00316 and 0BTM1)

Direct Sale (Normal Setup)

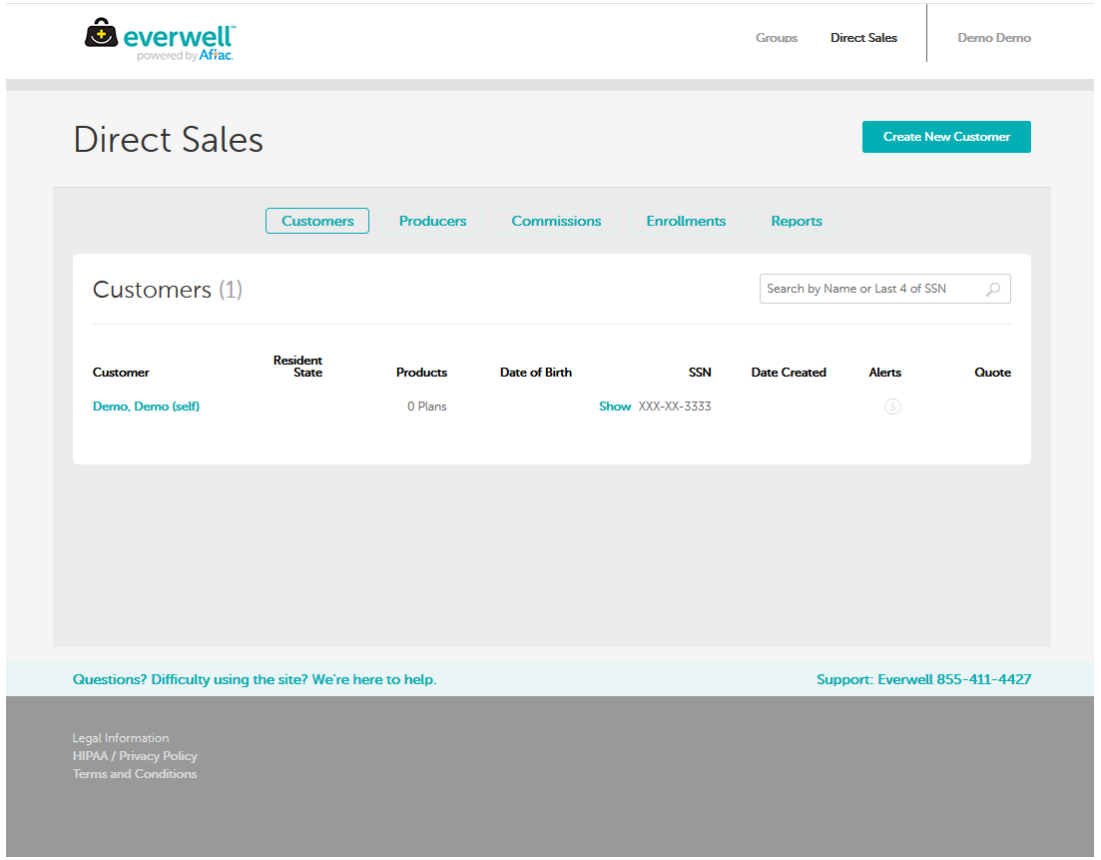


Direct Sales View



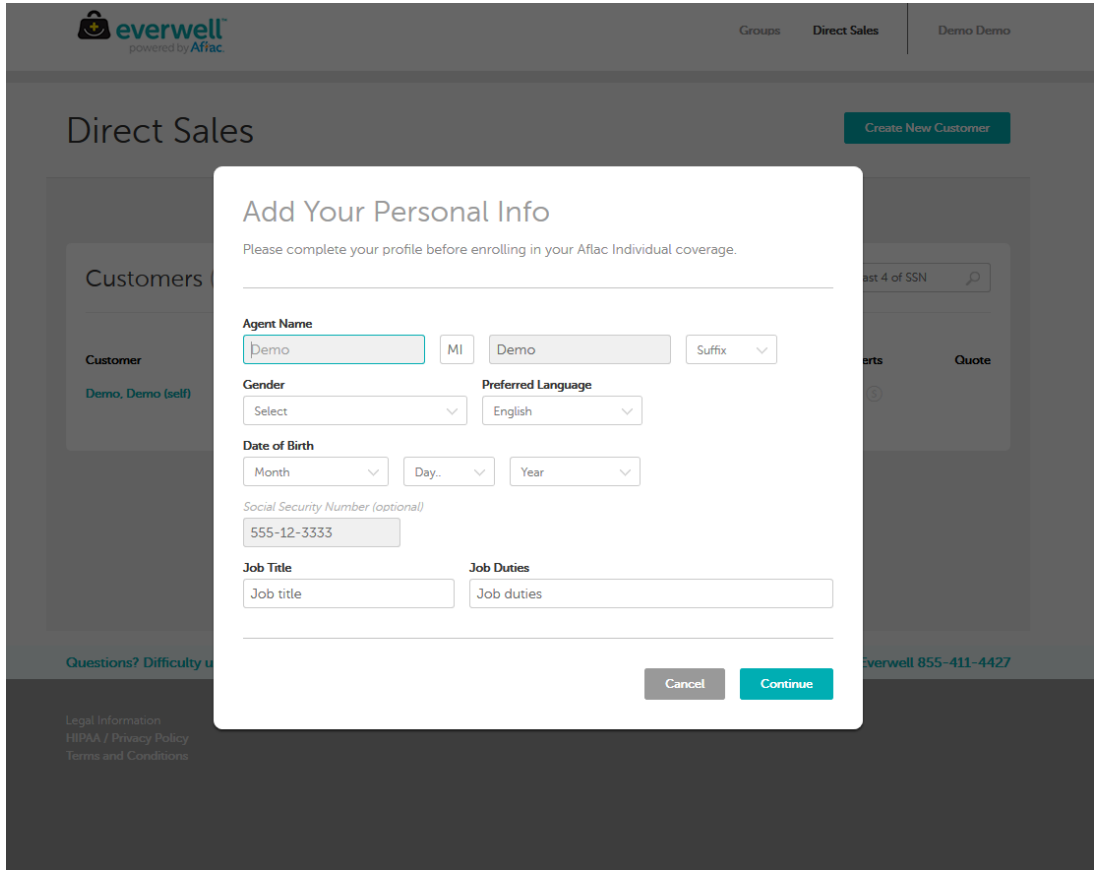
Agent Self-enrollment (00316 and 0BTM1)

- The system will automatically display a row that represents the agent.
  - Agent Info:
    - First and Last Name as determined by agent account info
    - SSN as determined by the agent account info
    - All other info will be blank by default as this info is not provided currently in the agent record



Beginning Self Enrollment – Agent Profile Setup

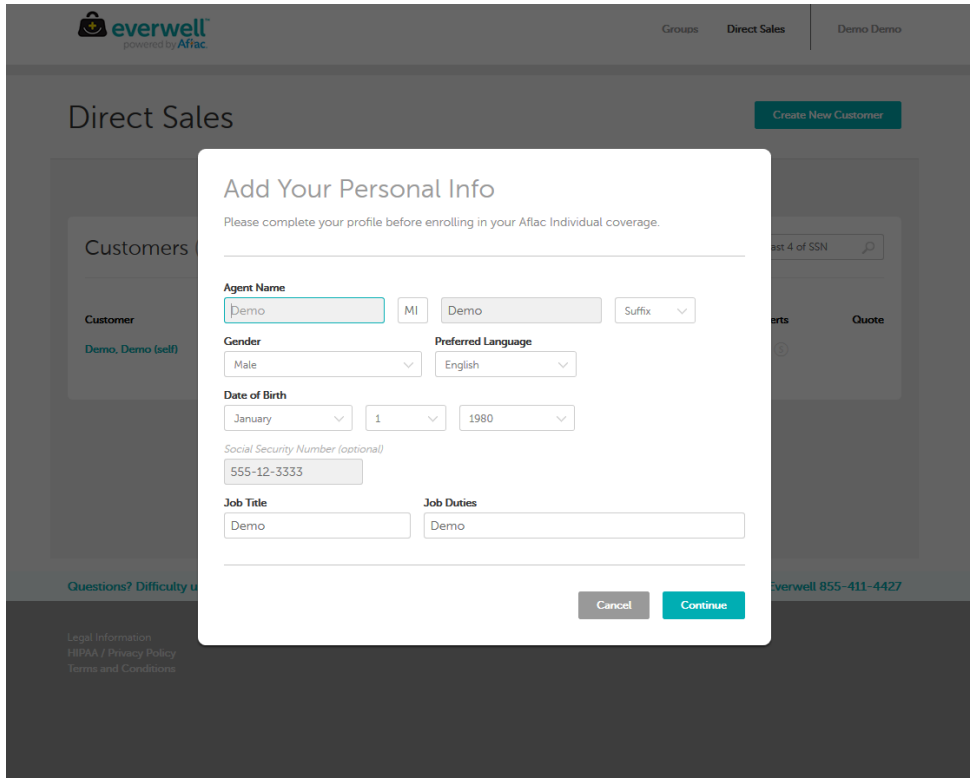
- Upon selecting to enroll themselves the system will prompt the agent to complete their profile
- Information that is captured already in their agent account info is non editable
- This setup only needs to be done once. If the agent chooses to enroll later after completing this setup the system will not re-prompt to complete this info



Agent Profile Setup

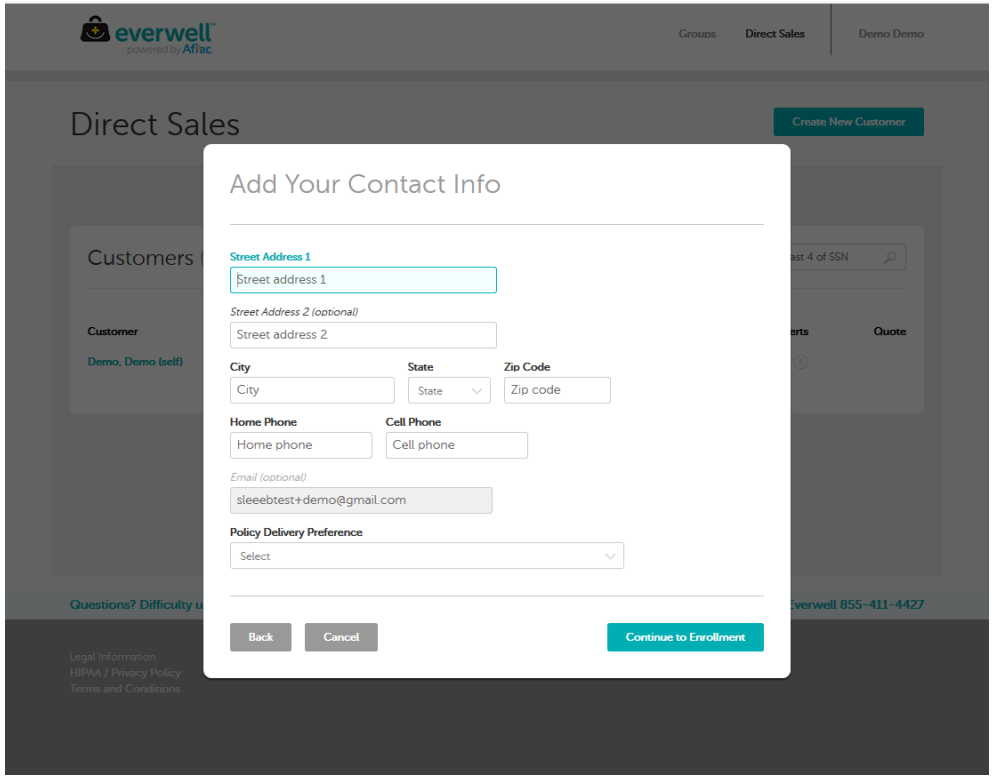
Personal Info Setup

Required Fields – First Name, Last Name, Gender, Preferred Language, DOB, SSN, Job Title, Job Duties



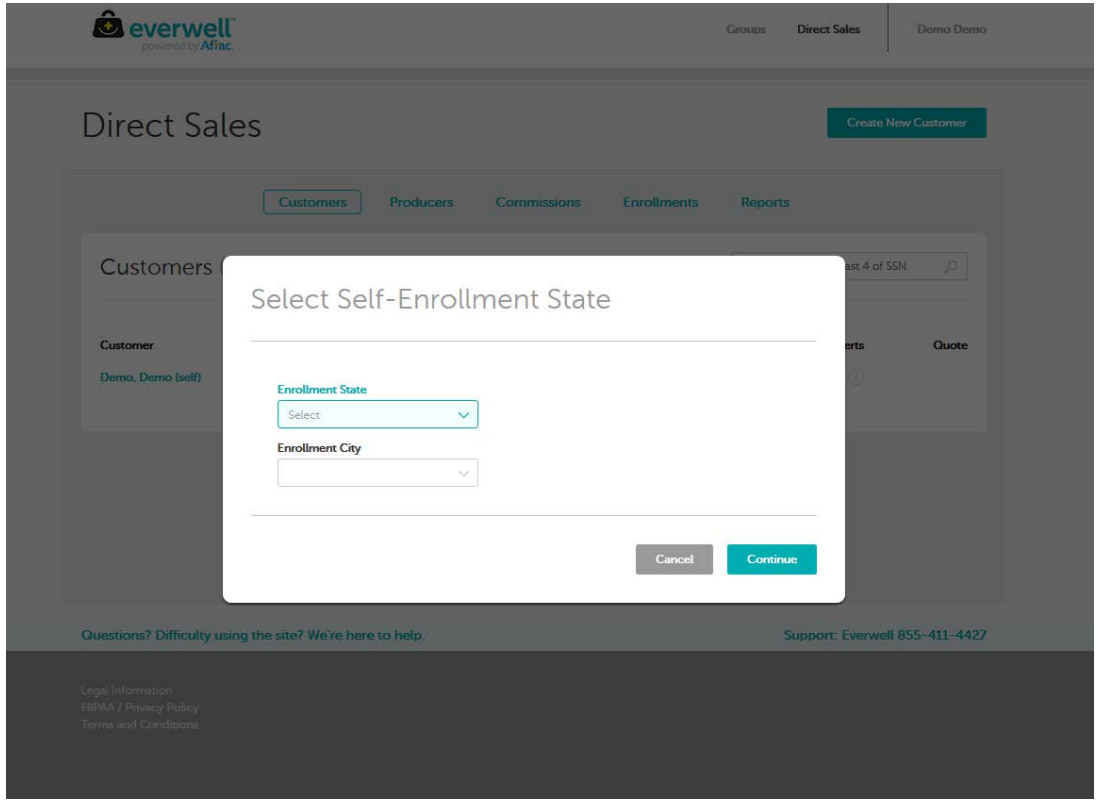
Contact Info

Required Fields – Street Address 1, City, State, Zip, One Phone Number, Email, Policy Delivery Preference



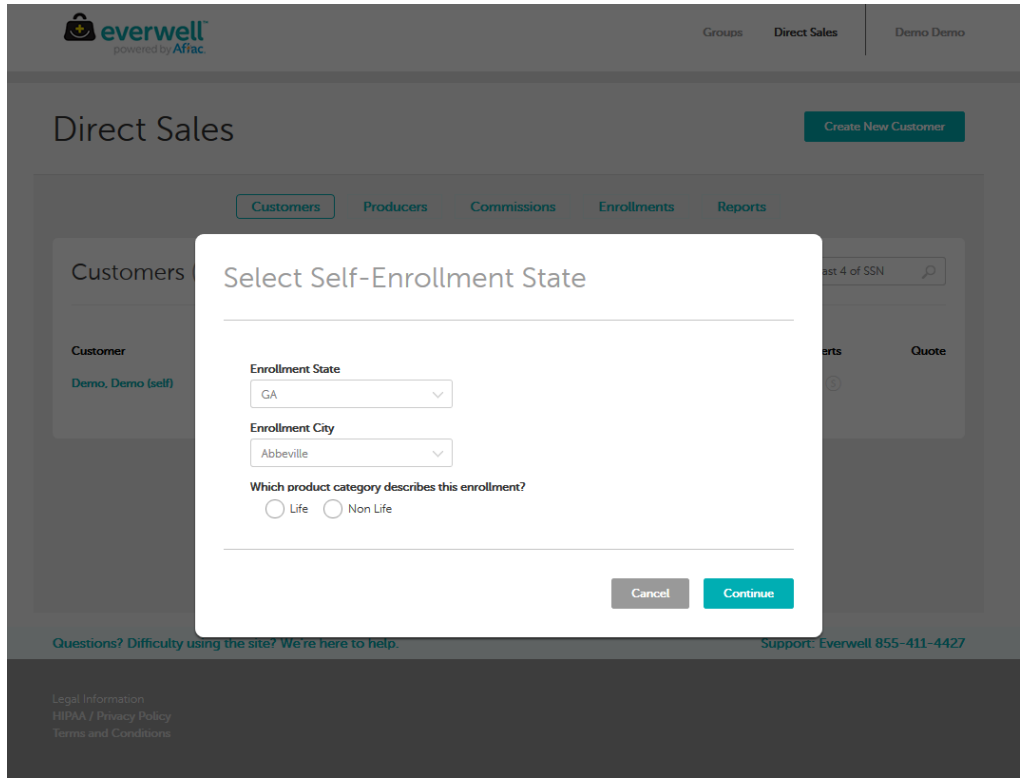
Agent Self Enrollment

- After completing the user's profile the system will prompt for the intended Enrollment State and City
- User can only select NY if there is an active license present for NY
- If user selects a non NY state the system will prompt if this is for a Life or Non Life enrollment. This allows the system to determine which agent account the user needs to be enrolled in (00316 vs 0BTM1)

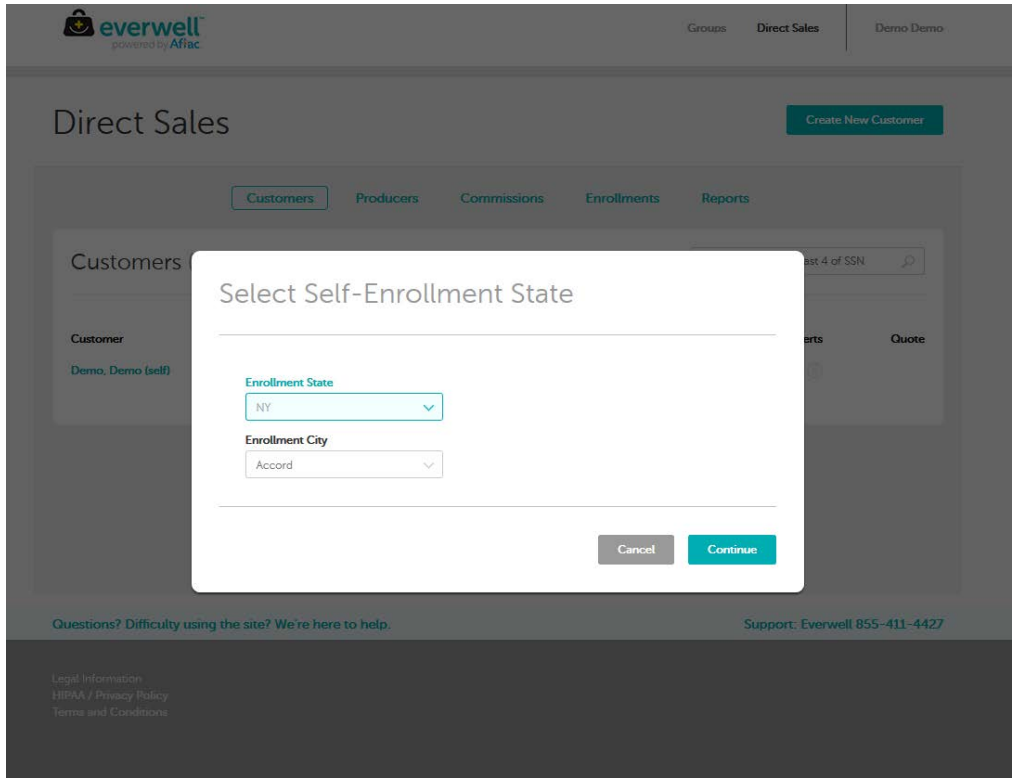


Agent Self Enrollment

Non NY Selection

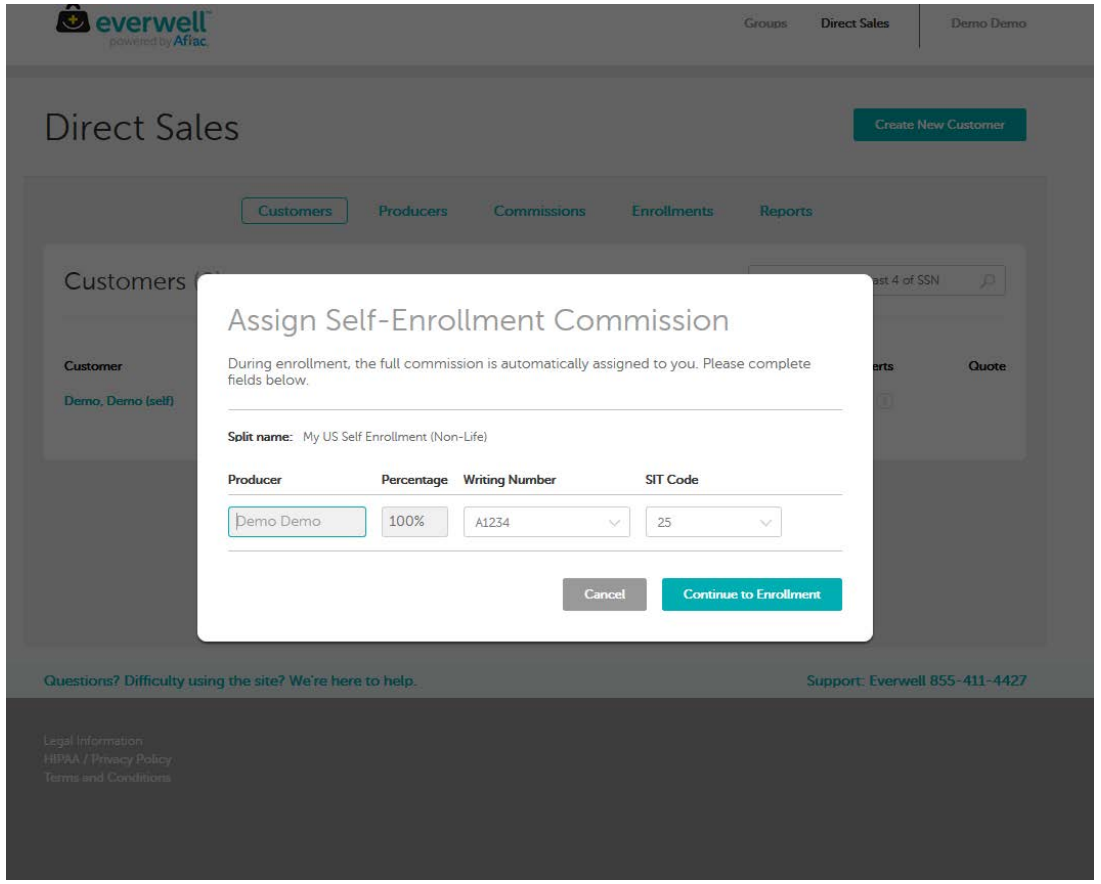


NY Selection



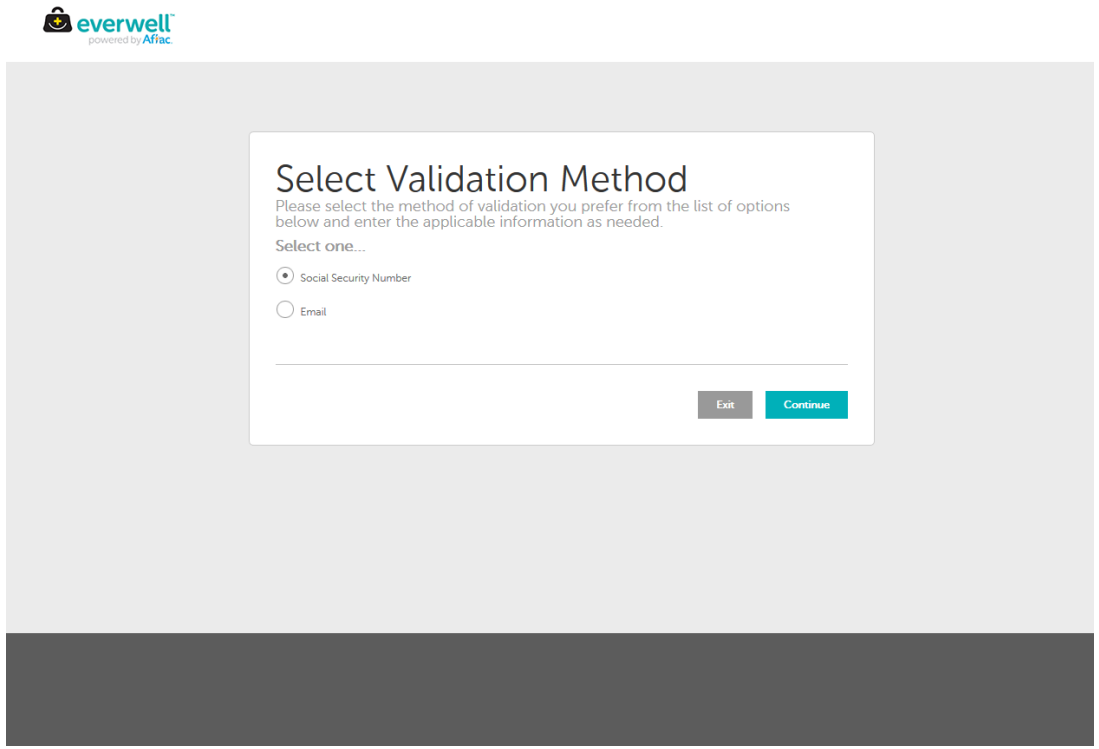
Agent Self Enrollment Default Commissions

- The first time a user enrolls in either US Life (0BTM1), US Non Life (00316) or NY (N2293) coverage the system will prompt the user to set up their default commissions for that specific type of enrollment which corresponds to a default commission for those accounts.
- If an agent is enrolling themselves in US Non Life coverage for the first time the system will prompt them to save a default commission for their US Non Life enrollments



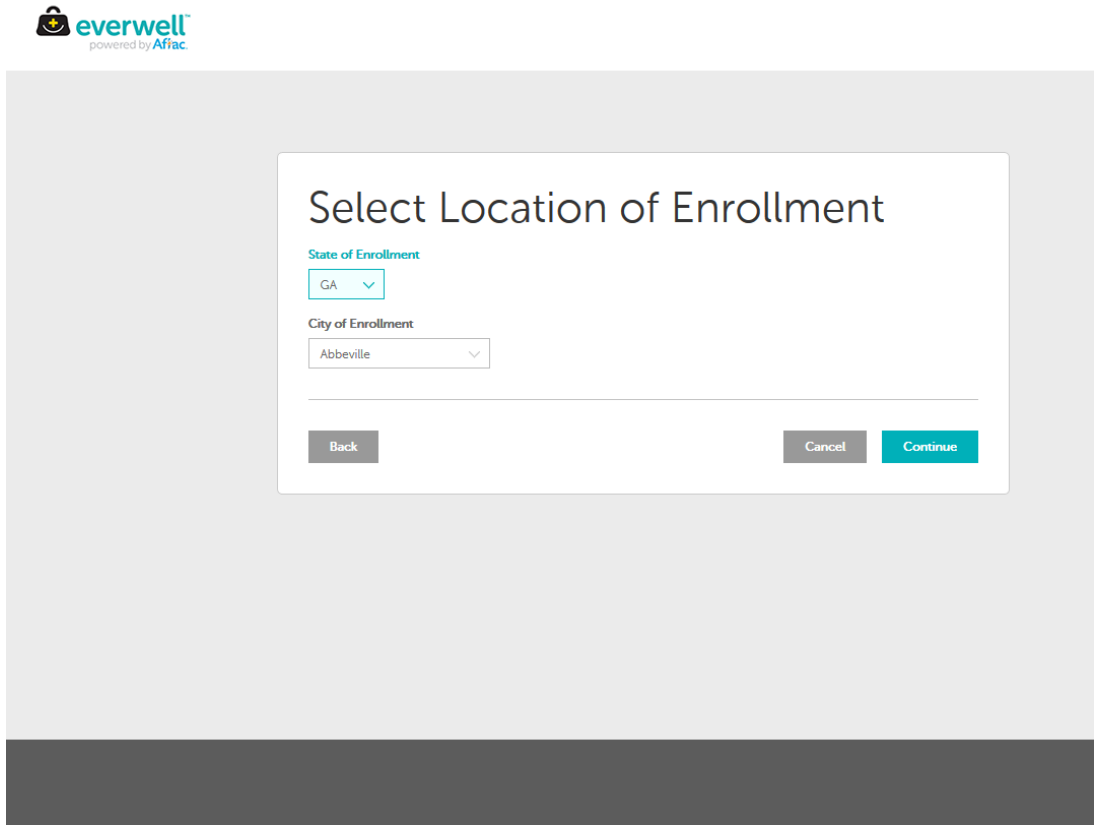
User Verification

- After setting up their appropriate self enrollment default commission the system will SSO the user into the appropriate 0BTM1, 00316 or N2293
- The flow from this point is the same as the normal payroll producer F2F flow but as the agent acting as the assisting producer for themselves.
- System will allow agent to authenticate using authentication methods available based on info saved on file (SSN, Email or Text)



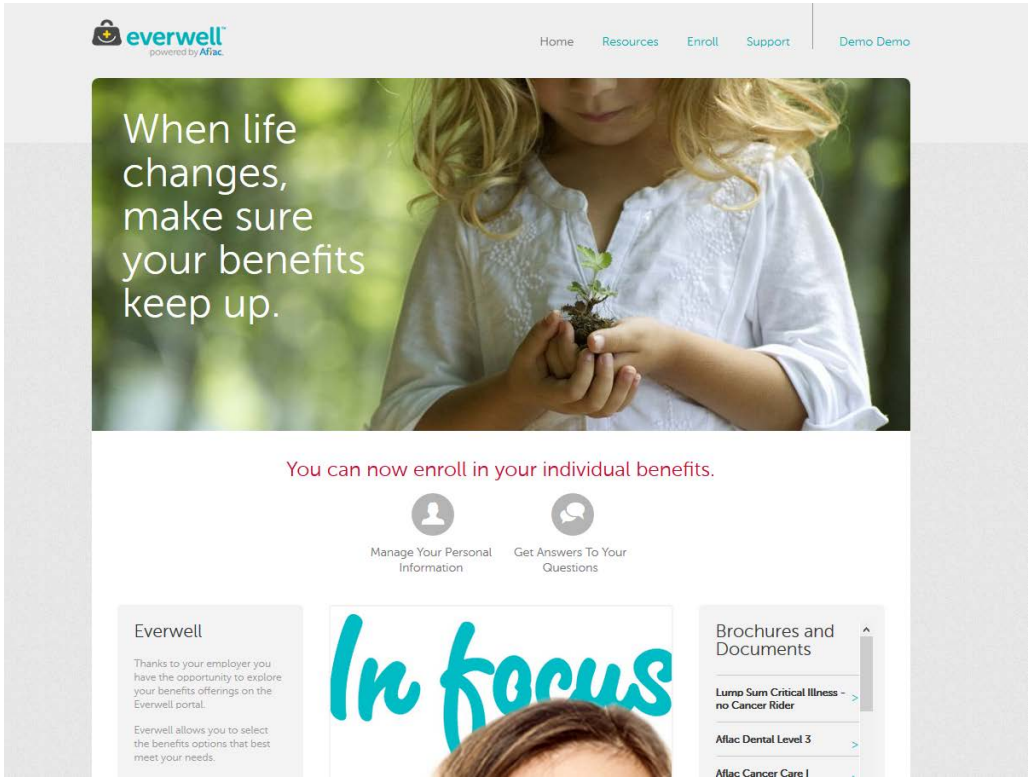
User Enrollment

- After successfully authenticating themselves the system will re-prompt for the location of enrollment.
- If user selected a non NY state then the user will not be allowed to select NY at this point. If user selected NY then the user will confirm NY as their state of enrollment.
- System will only present states that the user is appointed to sell in.

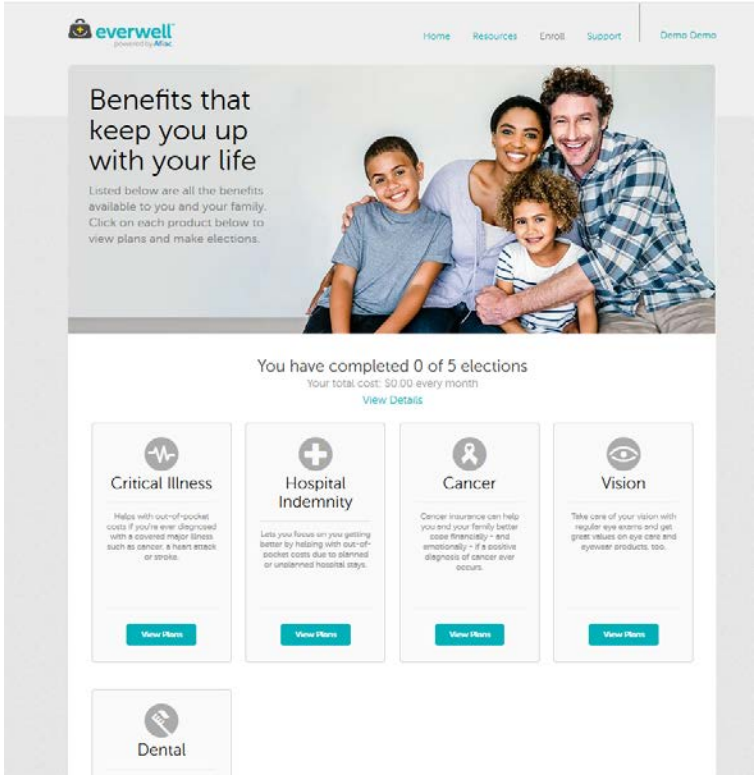


User Enrollment

User Lands on Shop Page

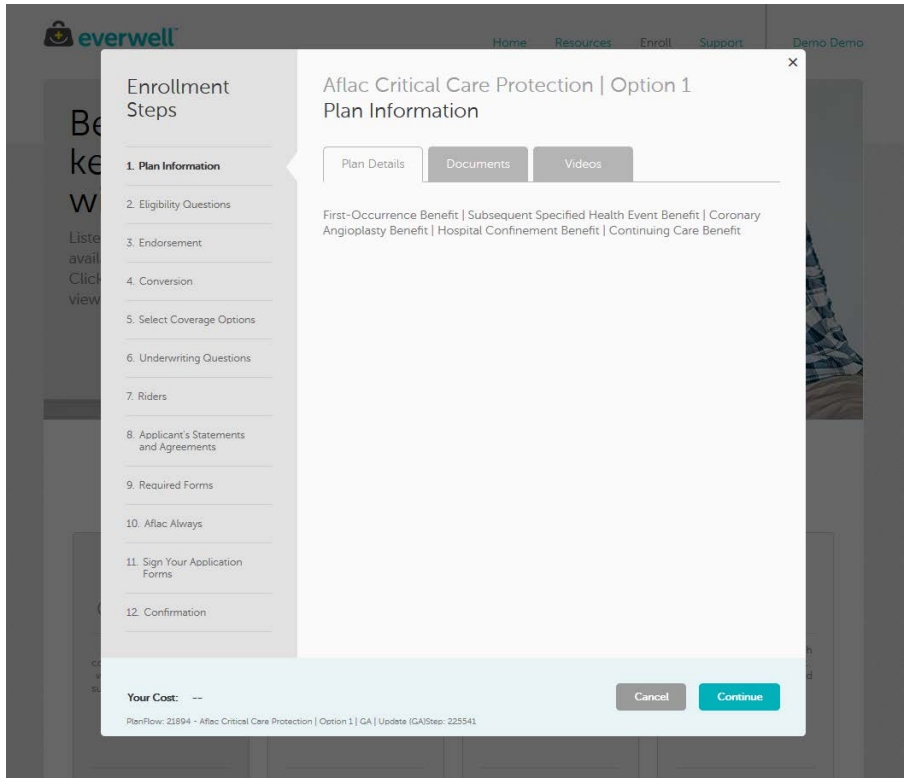


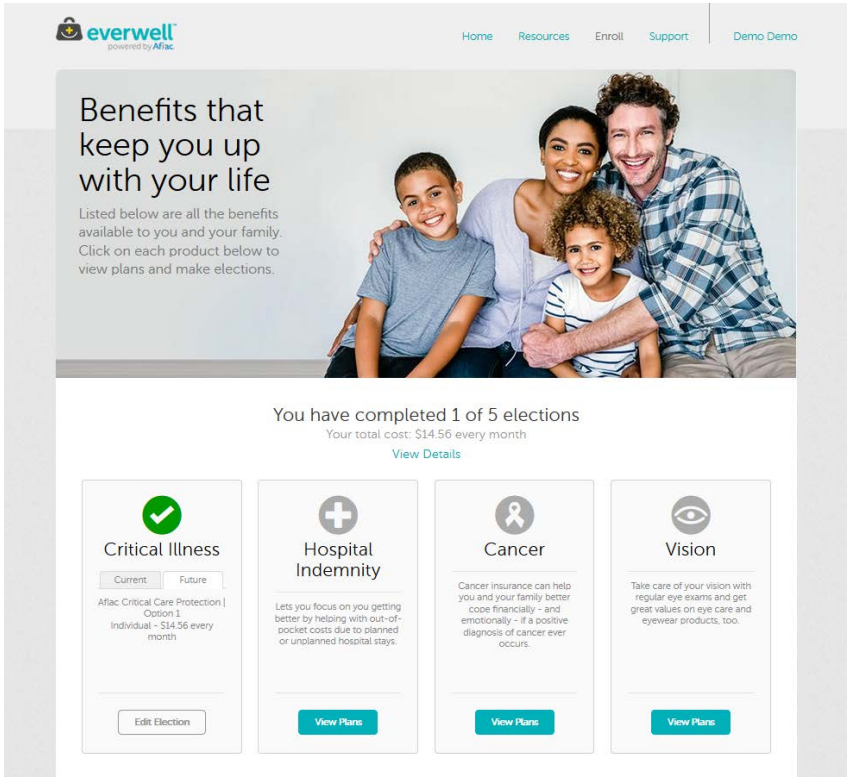
User can navigate to shop page for normal enrollment (screen example shows payroll products available for account 00316)



User Enrollment

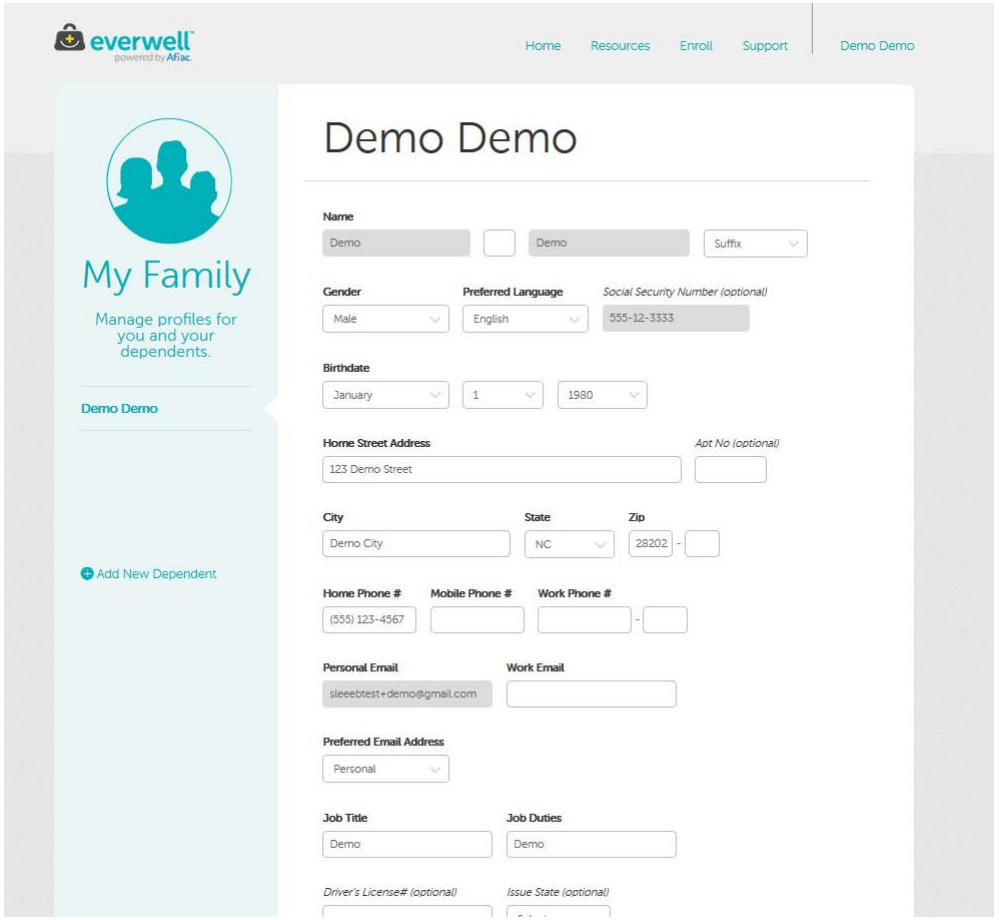
Agents can enroll themselves in coverage and will view coverage in the normal BAU process.





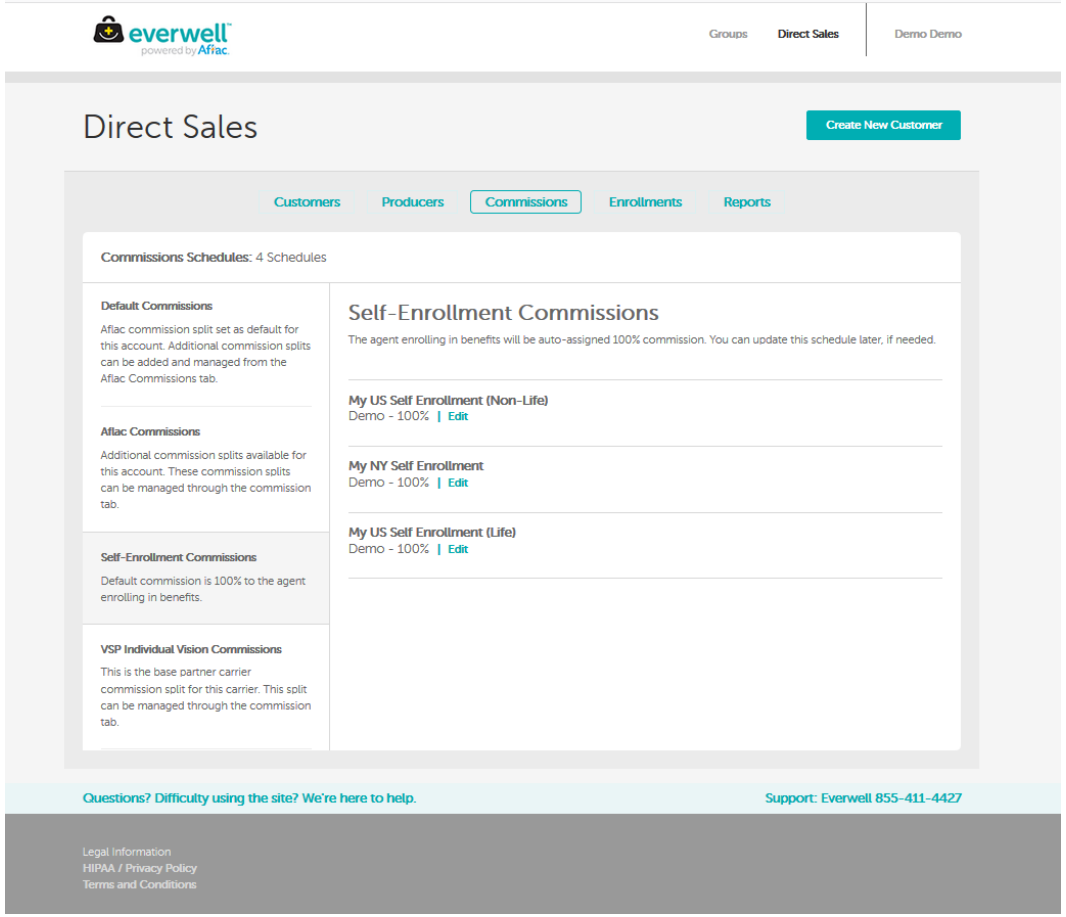
Managing Profile Info

- User can edit their profile or dependent information on the My Family page.
- However user will not be able to edit any information that is tied to their agent account information (Name, SSN, Email) that is received from their Aflac's agent record. Any updates to the un-editable fields will need to be made through Field Contracting.



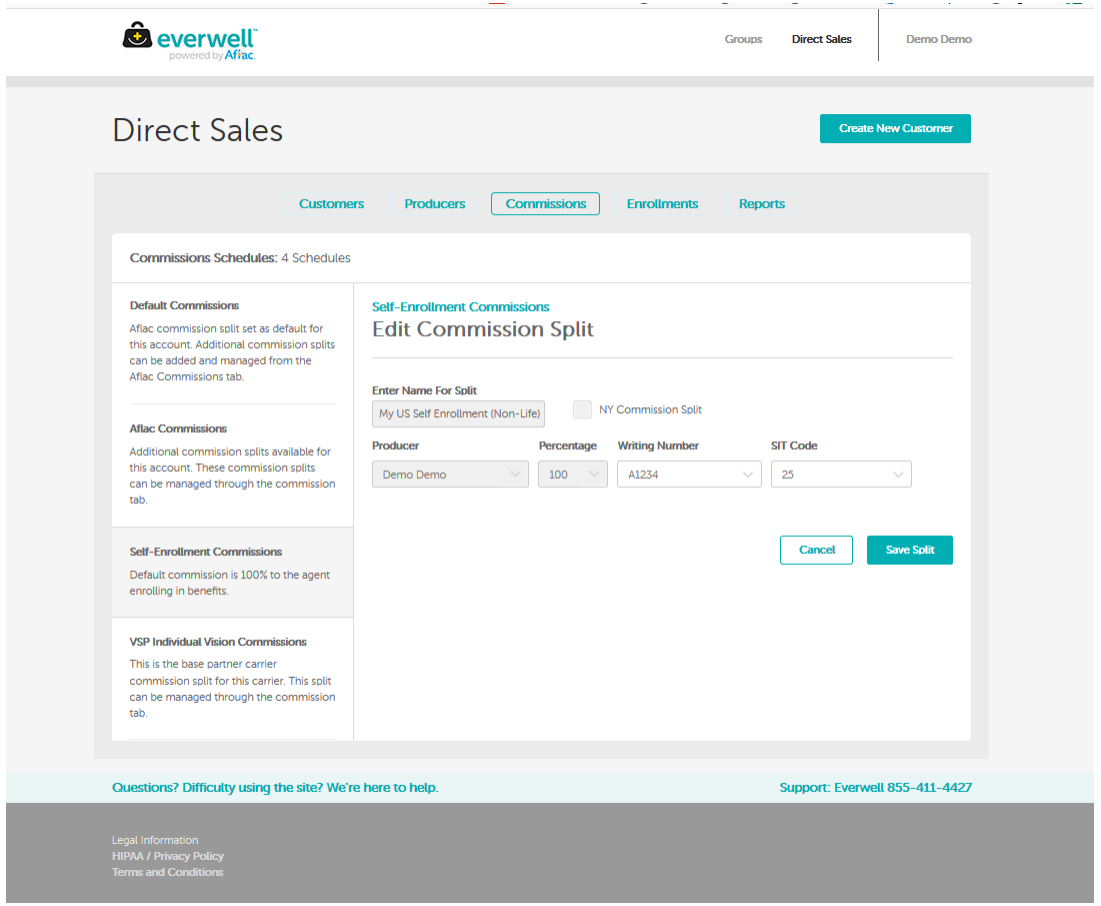
Managing Agent Self Commissions

- An agent can adjust their writing number / sit code settings for the self commissions via the Commissions page.
- Once a user has set up their default commissions then it will display for them to edit moving forward.



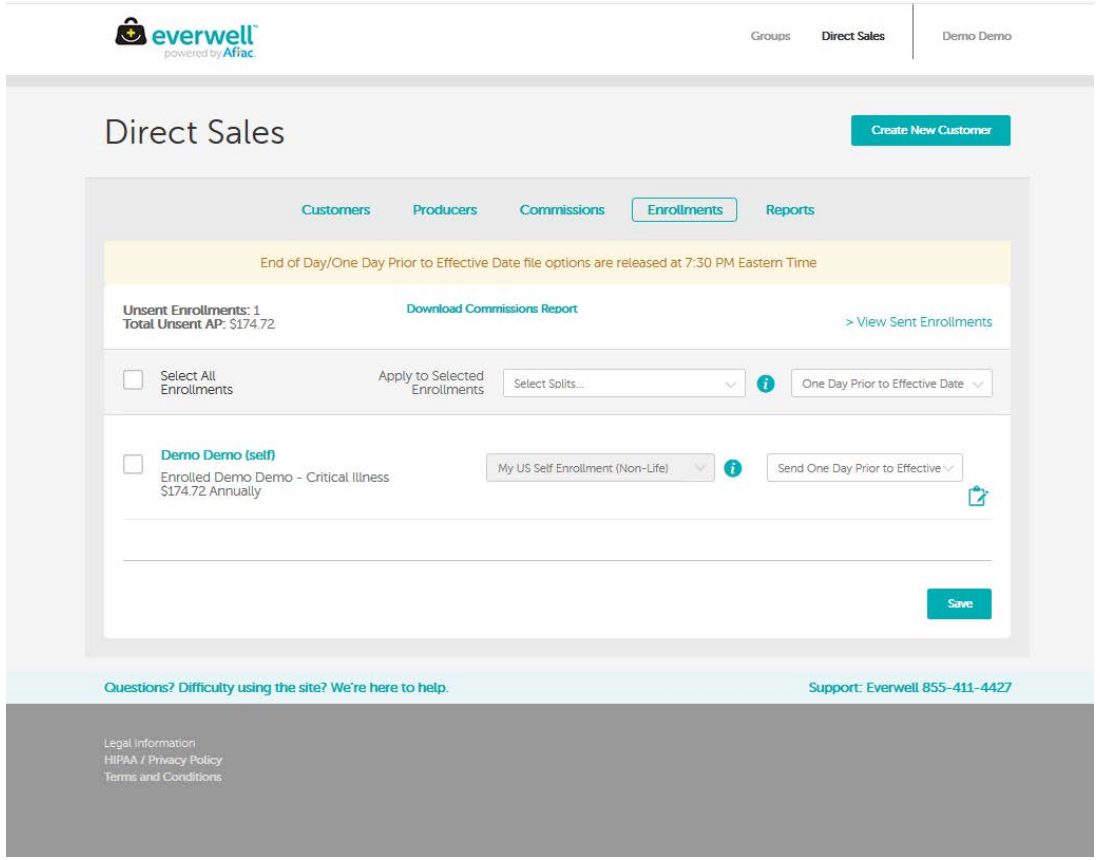
Managing Agent Self Commissions

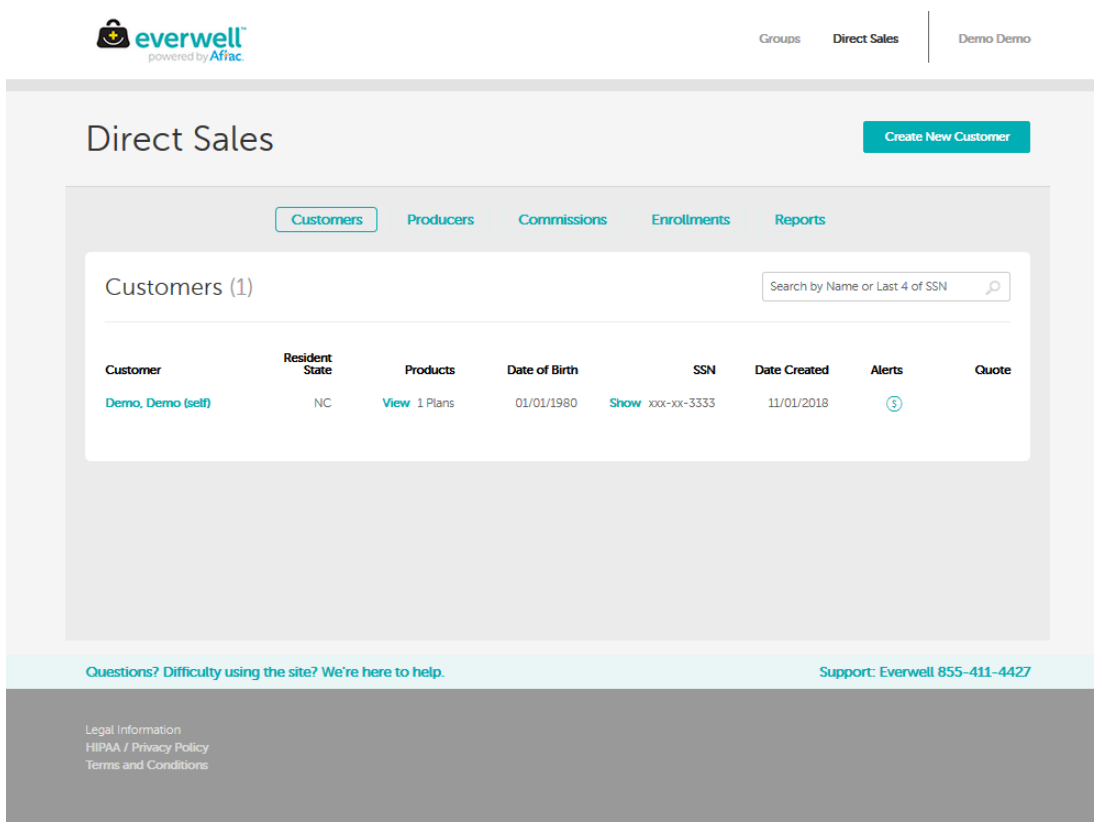
- When editing a default commission for self enrollment the system will only allow the user to adjust the writing number and sit code.
- Agent will not be allowed to add a producer, adjust the name or percentage.



Managing Agent Self Transmittals

- An agent can adjust their own enrollment transmittal settings on the Enrollments page.
- Any agent self enrollment will list the agents name as well as “(self)” to differentiate between their normal direct sale customer enrollments
- Aside from preventing the user from using a custom commission schedule the functionality on editing effective date and delivery timing remain the same



Re-Enrolling

- If a user ever wants to edit their coverage or apply for new coverage they can just reselect themselves on their Customers page.
- Since their profile info is already set the system will prompt the user to state their state of enrollment.