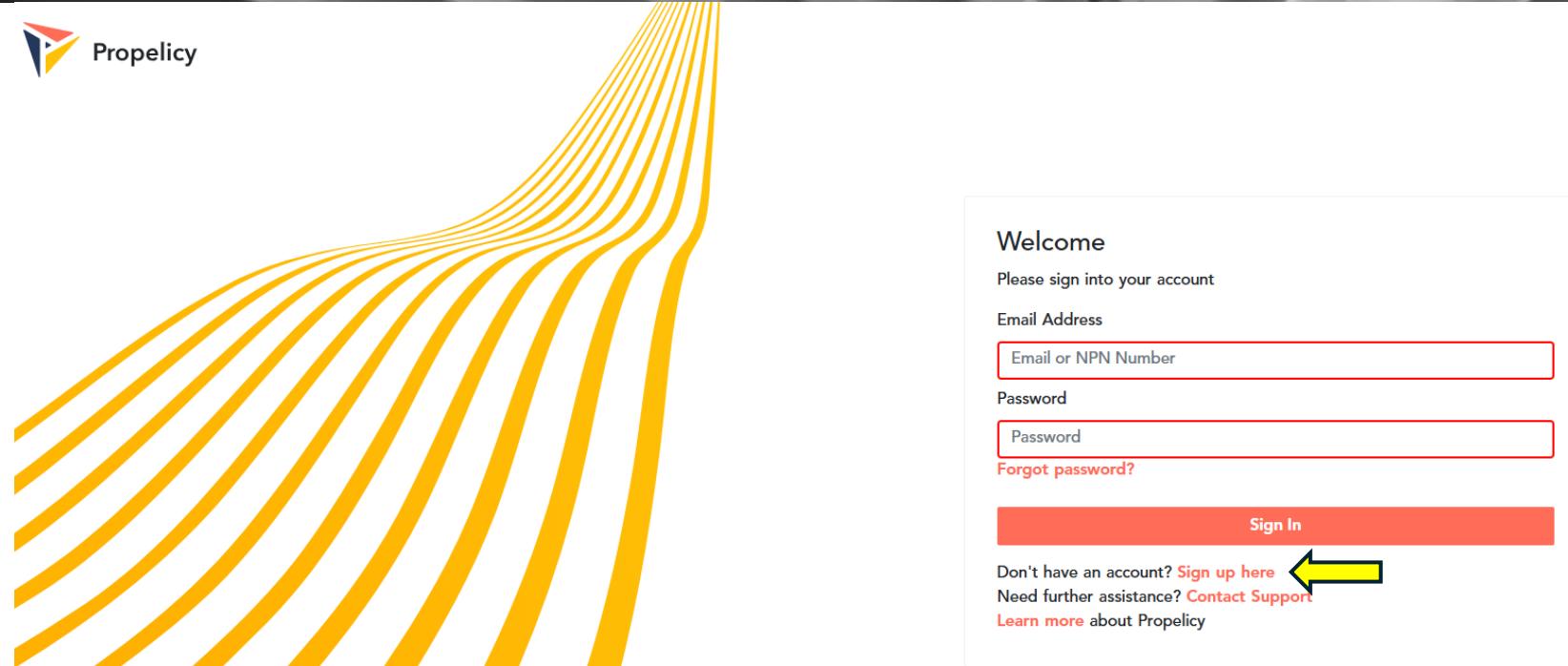
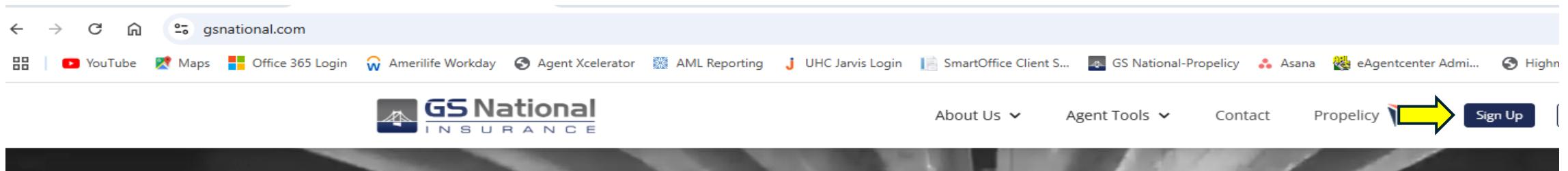


Onboarding Instructions for Brokers through GS National Insurance and Propelicy

Using Google Chrome, navigate to www.gsnational.com and click on the **Sign Up** box at the upper right corner.



On the following page, select which best describes your onboarding preference. If you are an agency owner but only plan to pay your commissions to your agency (agency will not have any other downline brokers), please select Broker. Select whether you will assign commissions to yourself (SSN) or to your agency (EIN).



Choose what best describes you so that we can provide you with the best experience in Propelicy.

Broker

Agency

I am an independent or licensed only broker.

I'm assigning commissions to myself

I'm assigning commissions to my agency

Confirm & Next →

Next, fill out the information as requested the click Confirm & Next to continue.



Great, please fill out your information below to get started as an Broker

First Name

Last Name

Email

Broker NPN Number

Last four digits of SSN

← Back

Confirm & Next →



After completing the requested information, confirm the information is correct and how commissions are to be assigned.



Take a moment to review and ensure your information is correct.

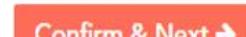
Type: Broker
Email:
First Name:
Last Name:
NPN:
Last 4 SSN:
Commissions **I will assign commissions to myself**

Take a moment to review and ensure your information is correct.

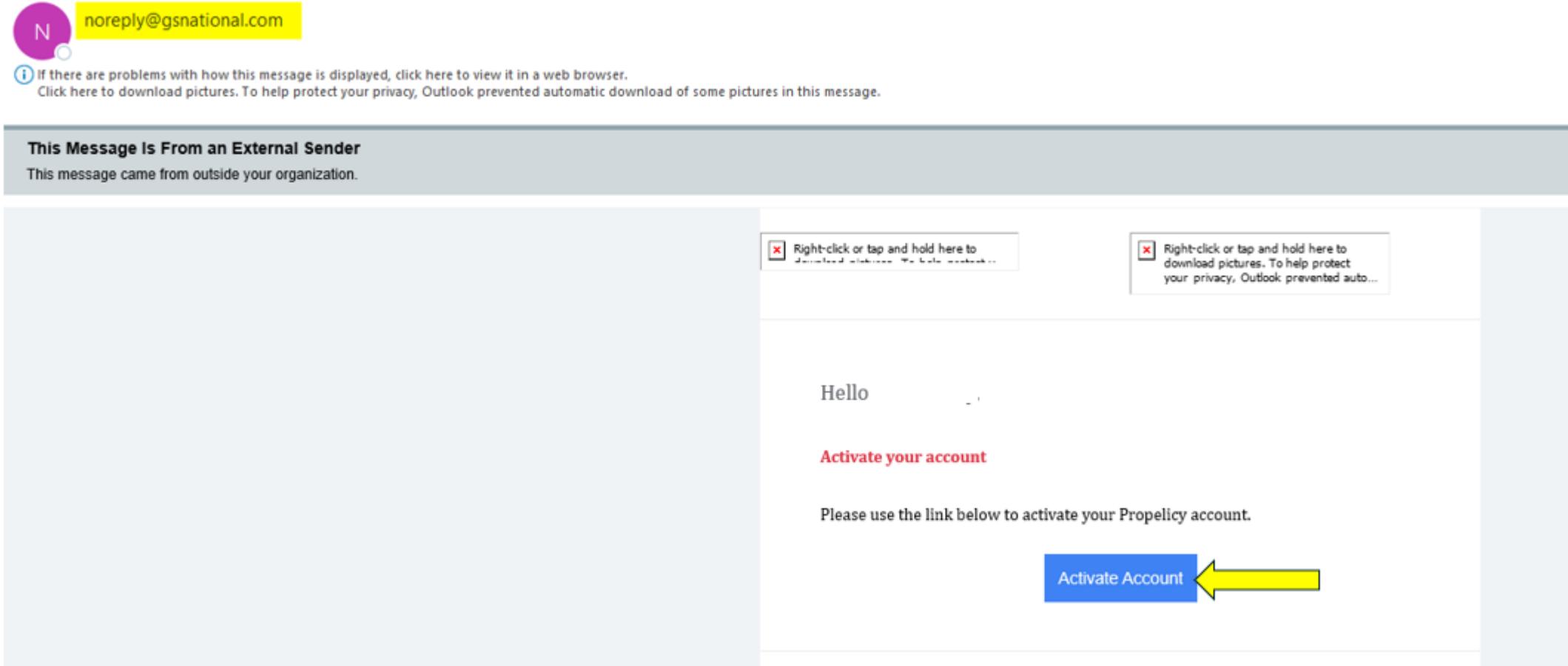
Type: Broker
Email:
First Name:
Last Name:
NPN:
Last 4 SSN:
Commissions **I'm assigning commissions to my agency**

By confirming, you are submitting your request to become a downline of GS National with the above information.

By confirming, you are submitting your request to become a downline of GS National with the above information.



After clicking Confirm & Next, you will receive an email from noreply@gsnational.com. Please be sure to check your spam folder as well for this email. Locate the email and click on Active Account.



The screenshot shows an email from noreply@gsnational.com. The email header includes a purple circular profile picture with a white 'N', the recipient's name, and the email address. A note indicates that if there are problems with how the message is displayed, it can be viewed in a web browser or downloaded pictures can be downloaded to protect privacy. The message itself is from an external sender and is addressed to the recipient. It contains two red 'X' icons with instructions to right-click or tap and hold to download attachments or pictures. The body of the email starts with 'Hello' and a red link labeled 'Activate your account'. Below this, a note says to use the link to activate the Propelicy account. A blue button labeled 'Activate Account' is highlighted with a yellow arrow pointing to it.

noreply@gsnational.com

i If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

This Message Is From an External Sender
This message came from outside your organization.

Right-click or tap and hold here to download attachments. To help protect your privacy, Outlook prevented automatic download of some attachments in this message.

Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hello

Activate your account

Please use the link below to activate your Propelicy account.

Activate Account 

After clicking on Activate Account from the email, you will be directed to Set you password. ***Please remember your username will be your email address***



Propelicy

Your account has been activated.
Please set your password.

Set Password -> 

Propelicy

Your password must meet all requirements to continue.

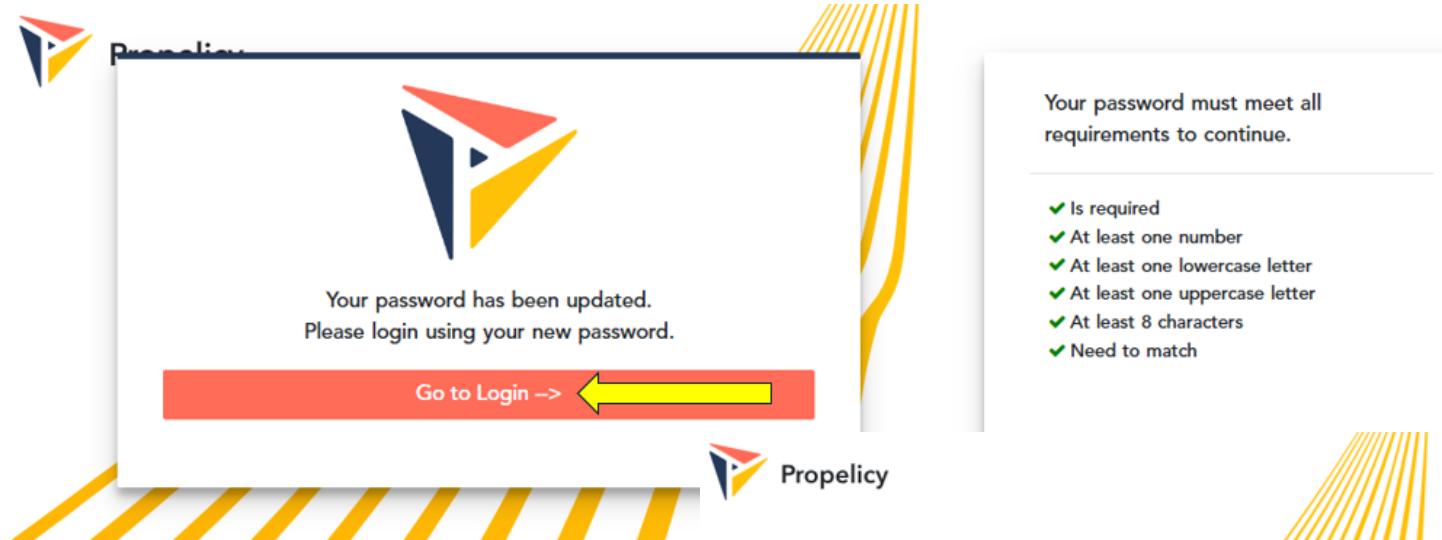
- ✗ Is required
- ✗ At least one number
- ✗ At least one lowercase letter
- ✗ At least one uppercase letter
- ✗ At least 8 characters
- ✓ Need to match

Password 

Confirm Password 

Update Password 

After setting up your password. Please click on Go to Login to complete the registration and log in procedure.



Welcome
Please sign into your account

Email Address

Password

[Forgot password?](#)

←

Don't have an account? [Sign up here](#)
Need further assistance? [Contact Support](#)
[Learn more](#) about Propelicy

Once you have successfully logged in, you will be directed to complete the onboarding process. The first step is to complete your User Demographics. Be sure to complete all fields. Click Save & Proceed upon completion.

Propellicy

Contracting

User Info ←

Appointment States

Carrier Selection

Authorization

Legal

E&O Policy

ACH Authorization

W-9

AHIP Attachment

Please provide us with some required information to get your profile started.

Agent Information

First Name

Last Name

SSN

Date of Birth:

mm / dd / yyyy

Phone

* Phone number is required

Current Email

training1@gunational.com

Address

Apt., Suite, etc.

City

State

Postal Code

Save & Proceed ←

Back

Save & Log Out

0

Next, select the state you wish to appoint and sell in. At least one state must be selected. If you are only licensed in your resident state, please select that state. Click Save & Proceed once complete.

Do you want to receive alerts or notifications from Propelicy via text messages?

 **Propelicy**  

Contracting

User Info

Appointment States 

Carrier Selection

Authorization

Legal

E&O Policy

ACH Authorization

W-9

AHIP Attachment

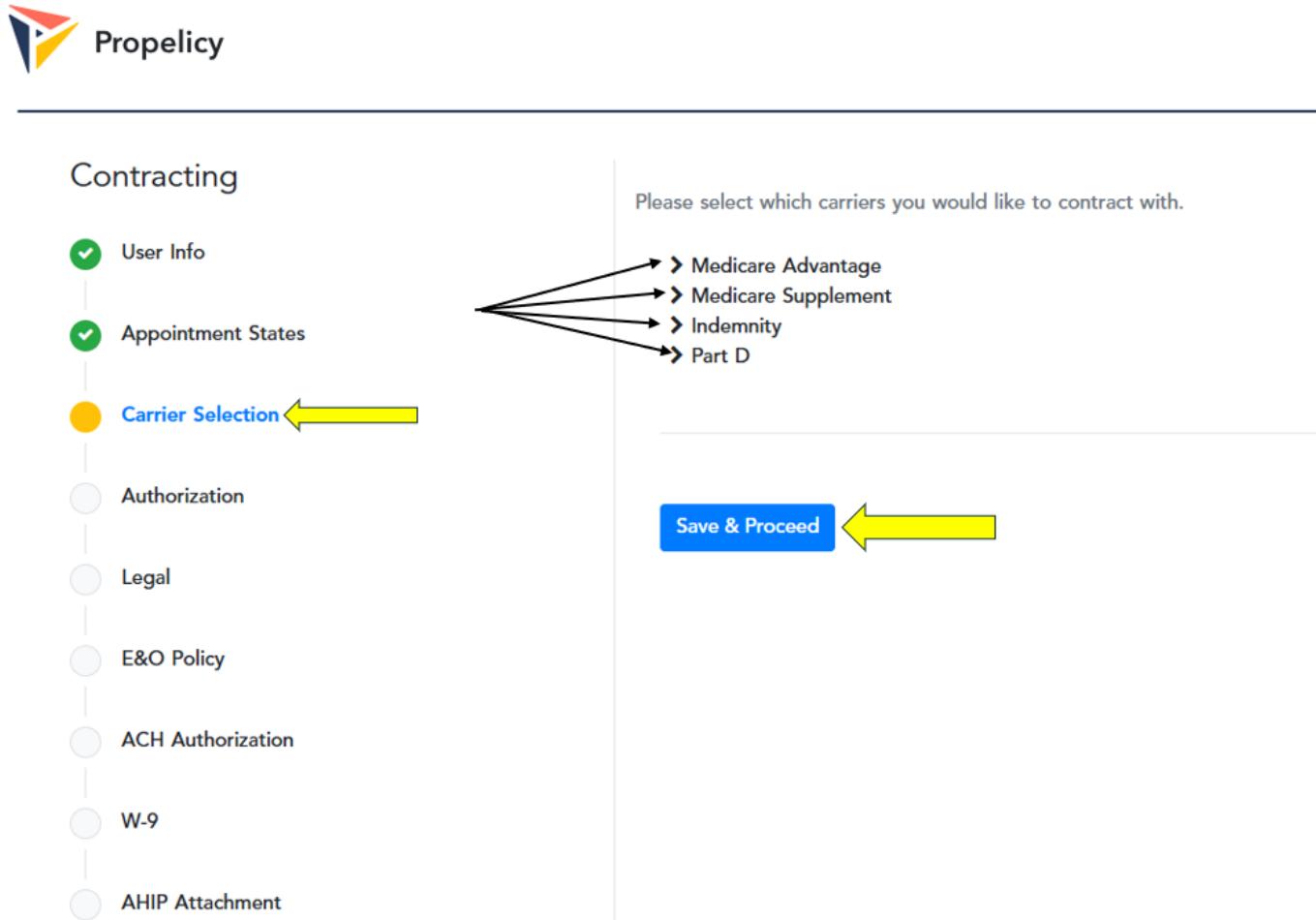
Select at least one state you want to be appointed in

<input type="checkbox"/> Alabama	<input type="checkbox"/> Arizona	<input type="checkbox"/> Arkansas
<input type="checkbox"/> Colorado	<input type="checkbox"/> Connecticut	<input type="checkbox"/> Delaware
<input type="checkbox"/> District Of Columbia	<input type="checkbox"/> Florida	<input type="checkbox"/> Georgia
<input type="checkbox"/> Illinois	<input type="checkbox"/> Indiana	<input type="checkbox"/> Kansas
<input type="checkbox"/> Kentucky	<input type="checkbox"/> Louisiana	<input type="checkbox"/> Maine
<input type="checkbox"/> Maryland	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> Michigan
<input type="checkbox"/> Minnesota	<input type="checkbox"/> Mississippi	<input type="checkbox"/> Missouri
<input type="checkbox"/> New Jersey	<input type="checkbox"/> New York	<input type="checkbox"/> North Carolina
<input type="checkbox"/> Ohio	<input type="checkbox"/> Oregon	<input type="checkbox"/> Pennsylvania
<input type="checkbox"/> South Carolina	<input type="checkbox"/> Texas	<input type="checkbox"/> Virginia
<input type="checkbox"/> Washington	<input type="checkbox"/> West Virginia	





On the following screen you will need to select the carrier(s) you wish to contract. Please be advised there are 4 different categories, Medicare Advantage; Medicare Supplement; Indemnity; Part D. To view each list, click the carrot to the side of each category. Click Save & Proceed once you have made your selection(s).



The image shows a screenshot of the Propelicy Contracting screen. At the top left is the Propelicy logo. Below it is a navigation bar with the title "Contracting" and a list of steps: "User Info" (checked), "Appointment States" (checked), "Carrier Selection" (highlighted with a yellow arrow), "Authorization" (unchecked), "Legal" (unchecked), "E&O Policy" (unchecked), "ACH Authorization" (unchecked), "W-9" (unchecked), and "AHIP Attachment" (unchecked). To the right of the navigation bar is a main content area with the heading "Please select which carriers you would like to contract with." Below this heading are four categories with arrows pointing to them: "Medicare Advantage", "Medicare Supplement", "Indemnity", and "Part D". At the bottom right of the content area is a blue button labeled "Save & Proceed" with a yellow arrow pointing to it.

Contracting

- User Info
- Appointment States
- Carrier Selection** 
- Authorization
- Legal
- E&O Policy
- ACH Authorization
- W-9
- AHIP Attachment

Please select which carriers you would like to contract with.

- ▶ Medicare Advantage
- ▶ Medicare Supplement
- ▶ Indemnity
- ▶ Part D

Save & Proceed 

Carrier(s) Continued

Please select which carriers you would like to contract with.

▼ Medicare Advantage

Aetna
Alterwood
Anthem
Capital BlueCross
CareFirst DSNP
CareFirst Medicare Advantage
Cigna Healthcare
Clear Spring Health
Clover Health
Excellus Health Plan
Highmark
Highmark Wholecare
Humana
Johns Hopkins
Kaiser Permanente
United Healthcare
Univera Healthcare
UPMC
WellCare

[Agent PDF](#)

▼ Medicare Supplement

Aetna Senior Supplement
Americo
Anthem
Capital BlueCross
CareFirst
Cigna
Excellus Health Plan
GTL
Highmark
Humana
Medico
Mutual Of Omaha
United American
United Healthcare

[Agent PDF](#)

[Agent PDF](#)

[Agent PDF](#)

▼ Indemnity

Aetna Senior Supplement
GTL
Medico

[Agent PDF](#)

[Agent PDF](#)

[Agent PDF](#)

▼ Part D

Anthem
Highmark
Humana
SilverScript
United Healthcare
WellCare



Next is the Authorization acceptance. Use your finger to sign your name if you have a touch screen. Use your mouse to sign if you do not have a touch screen. Click Save & Proceed.



Propelicy

Contracting

- User Info
- Appointment States
- Carrier Selection
- Authorization** 
- Legal
- E&O Policy
- ACH Authorization
- W-9
- AHIP Attachment

I hereby authorize GS National Insurance (the "Authorized Party") to affix or append a copy of my signature, as set forth below, all required signature fields on forms, agreements and/or contracts for any insurance carrier (a "Carrier") designated by me through the GS National Insurance website, software or through any other means, including without limitation, by e-mail or orally. The Authorized Party shall be permitted to complete and submit all such forms, agreements and/or contracts on my behalf for the purpose of becoming authorized to sell Carrier insurance products. I hereby release, indemnify and hold harmless the Authorized Party against all claims, demands, losses, damages, and causes of action, including expenses, costs and reasonable attorneys' fees which they may sustain or incur as a result of carrying out the authority granted hereunder.

By my signature below, I certify that the information I have submitted to the Authorized Party is correct to the best of my knowledge and acknowledge that I have read and reviewed the forms, agreements and/or contracts which the Authorized Party have been authorized to affix my signature. I agree to indemnify and hold any third party harmless from and against all claims, demands, losses, damages, and causes of action, including expenses, costs and reasonable attorneys' fees which such third party may incur as a result of its reliance on any form or agreement bearing my signature pursuant to this authorization.

[Back](#) [Clear](#) [Save & Proceed](#) 

You will now be asked to answer some legal questions. The list varies depending on the contract(s) you wish to sign up for. Clicking on Yes on any questions will generate additional information that will need to be provided.

Contracting

- User Info
- Appointment States
- Carrier Selection
- Authorization
- Legal 
- E&O Policy
- ACH Authorization
- W-9
- AHIP Attachment

Please answer the following questions regarding your legal history.

Do you currently have any unresolved matters pending with the IRS or any other taxing authority?

Yes No

Has your state insurance license ever been denied, suspended, or revoked?

Yes No

Have you ever been charged with a felony?

Yes No

Have you ever been charged with a misdemeanor?

Yes No

Have you ever been convicted of or plead guilty or no contest to a felony?

Yes No

Have you ever been convicted of or plead guilty or no contest to a misdemeanor?

Yes No

Have you ever personally filed a bankruptcy petition or declared bankruptcy?

Yes No

Do you currently have any unresolved matters pending with the IRS or any other taxing authority?

Yes No

Date of Action

Select date

Action



Reason



Explanation



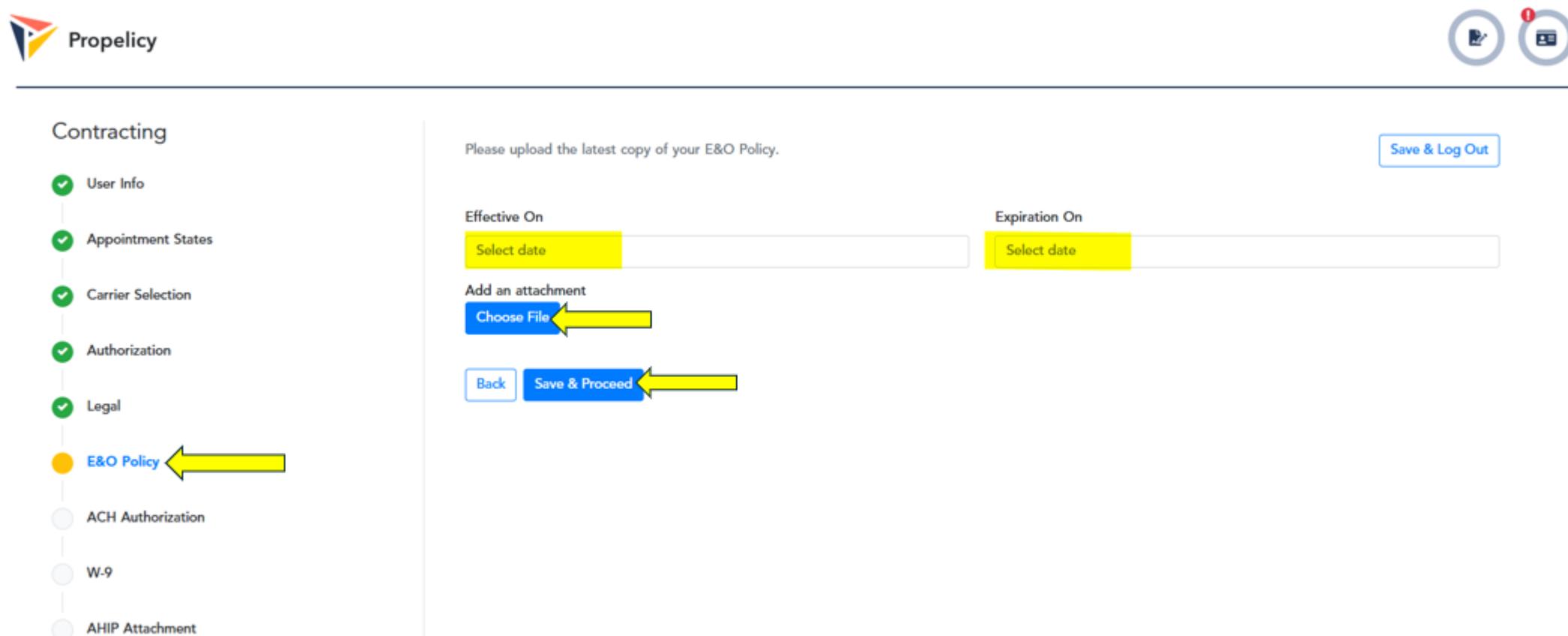
Add an attachment

Choose File 

Back

Save & Proceed 

After clicking Save & Proceed on the Legal questions, you will need to provide your E&O information. Enter the Effective and Expiration dates of your most recent E&O policy. Click on Choose File to attach that certificate then click Save & Proceed.



Propellicy

Contracting

- User Info
- Appointment States
- Carrier Selection
- Authorization
- Legal
- E&O Policy 
- ACH Authorization
- W-9
- AHIP Attachment

Please upload the latest copy of your E&O Policy.

Effective On

Expiration On

Add an attachment



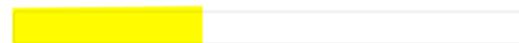
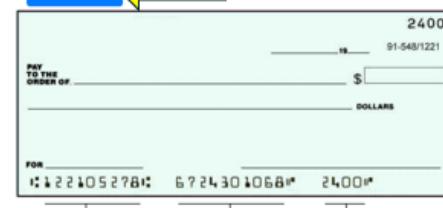
The next 2 pages are the banking requirements. If you are paying your commissions to your agency, this is where you will make that selection. Enter the ACH and W-9 data for how you wish to have commissions paid.


Contracting

- User Info
- Appointment States
- Carrier Selection
- Authorization
- Legal
- E&O Policy
- ACH Authorization 
- W-9
- AHIP Attachment

You may now set up your ACH authorization.

Save & Log Out

Bank Name	Account Type
	Checking 
Routing Number	Account Number
	
Add an attachment Choose File 	
	
Routing Number Account Number Check Number 1224052781 67243010681 24001	

 Back  Save & Proceed

CONFIRM

Please double check that

Bank name: 

Account Number: 

Routing Number: 

Save & Log Out

Change  It's all correct

Banking information Continued

Propelicy

Contracting

Please fill out your W-9 information below.
[See Instructions](#)

[Save & Log Out](#)

Name (as shown on your income tax return) [Redacted]
 * Entity name is required

Business name (if different from name) [Redacted]

Address [Redacted]
 * Address is required

City [Redacted] State [Redacted]
 * City is required * State is required

Postal Code [Redacted]
 * Zip code is required

Tax Classification [Redacted] Tax ID Number Type [Redacted] Tax ID Number [Redacted]

Exempt Payee Code [Redacted] Exempt from FATCA Code [Redacted]

Other Information [Redacted]

W-9 [Redacted]

AHP Attachment [Redacted]

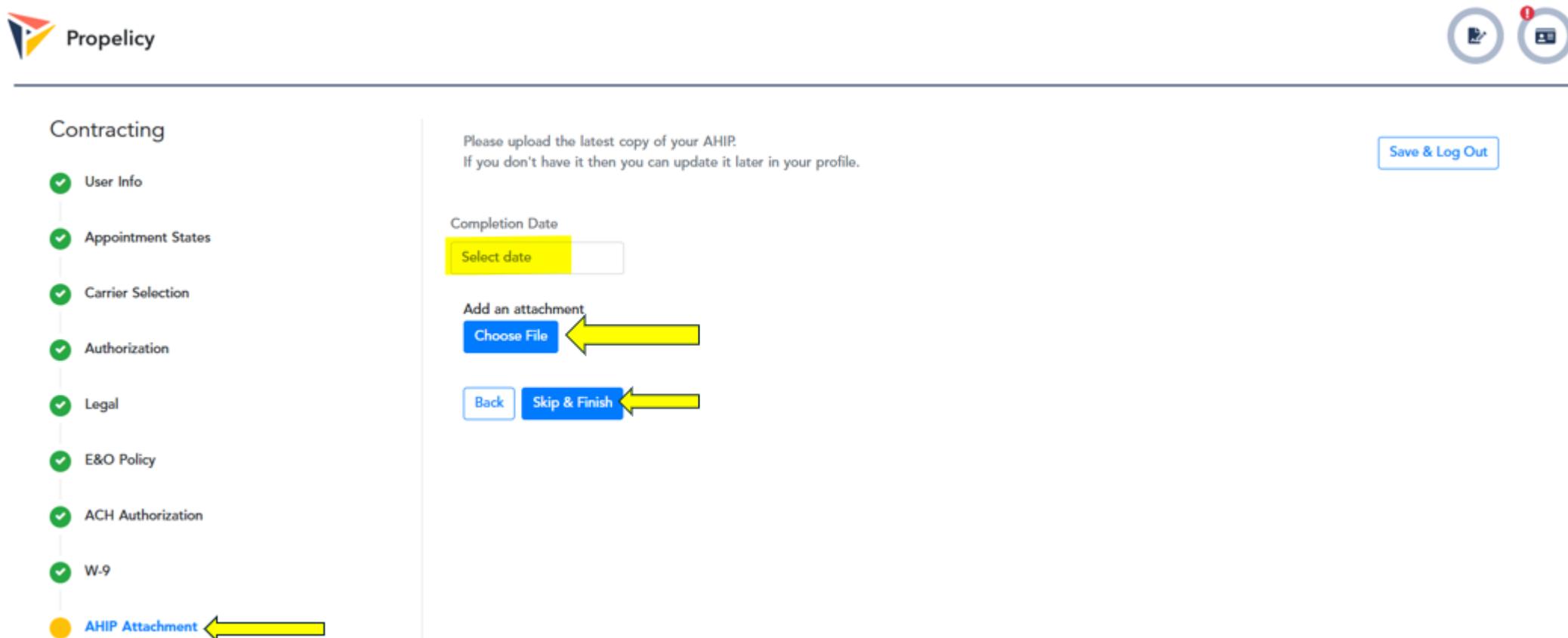
Clear

Under penalty of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends; or (c) the IRS has notified me that I am no longer subject to backup withholding; and
 3. I am a U.S. citizen or other U.S. person; and
 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

[Back](#) [Save & Continue](#) [Redacted]

Lastly, enter your AHIP completion date in the field provided then upload your certificate by clicking on Choose File. NOTE: if you select Skip & Finish without uploading your AHIP certificate, your contracting will not be processed until the AHIP certificate has been provided.



The screenshot shows the 'Contracting' step of the Propelicy application. On the left, a vertical list of completed steps is shown with green checkmarks: User Info, Appointment States, Carrier Selection, Authorization, Legal, E&O Policy, ACH Authorization, and W-9. The 'AHIP Attachment' step is highlighted with a yellow circle and an arrow pointing to the 'Choose File' button. The main right panel contains a note to upload the AHIP certificate, a 'Select date' button for the completion date, a 'Choose File' button for the attachment, and a 'Skip & Finish' button. A yellow arrow points to the 'Skip & Finish' button. The top right of the screen shows a 'Save & Log Out' button and two circular icons.

Contracting

- User Info
- Appointment States
- Carrier Selection
- Authorization
- Legal
- E&O Policy
- ACH Authorization
- W-9
- AHIP Attachment

Please upload the latest copy of your AHIP.
If you don't have it then you can update it later in your profile.

Completion Date

Select date

Add an attachment

Choose File

Back Skip & Finish

Save & Log Out

You are now complete with the onboarding process of your contracting request. You have immediate access to your account while GS National Insurance reviews and processes your contract(s). **IMPORTANT:** Please log out of your Propelicy account after each session. This will ensure you have the most up to date version.



Welcome to Propelicy!

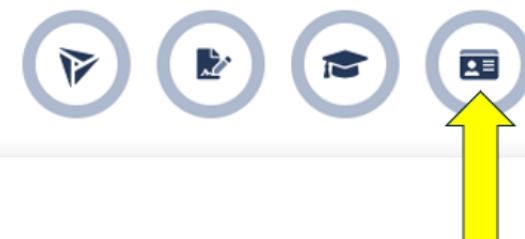
You are all finished on your end. We have some work to do in order to get your account fully set up. You can expect to have full access to the features in Propelicy in 24 to 48 hours.

However, we don't want you to wait that long to start looking around. Here are a few of the things you can do in the meantime:

[View the status of your requested contracts](#) >

[Learn more about Propelicy in the Resource Center](#) >

[View your personal profile](#) >



User Profile

My Tickets

Contact Support

Logout

