North American Company for Life and Health Insurance | Annuity

RegEd Q&A

Why the change to the RegEd platform?

A) RegEd is a well-known vendor. To allow for a simpler, more user-friendly product training format. Courses will be offered by product to allow ala carte selection.

Will current training convert over to RegEd?

A) Yes, Training will convert over to RegEd.

What are the training codes and when would we use them?

A) RegEd allows agents to enter a "product code" if specific training isn't yet assigned or if they are an agent who is not contracted with us yet. Refer to product code list on page 2.

When and how will new agents get notified of training requirements?

A) The process is exactly the same as today. The only changes are that IF the agent is a RegEd user, they will also get an email from RegEd advising they have new training to take.

How will existing agents be notified of new training requirements?

A) If they are registered with RegEd, they will getan email from RegEd, in addition to communications sent directly from North American.

Can an agent use their Corporate TIN to complete training on RegEd?

A) No, training must be completed under the agent's SSN Number.

How can agents check their training requirements and completions?

A) Agents can check training completions and requirements via our website (www.NorthAmericanCompany.com) or RegEd's website (https://secure.reged.com/TrainingPlatform/).

How and when will the training be reflected on our websites?

A) 24 hours after the training is completed, training will be reflected on our website.

What is the process when we add a new feature to an existing product (i.e. income rider)?

A) New Product – New Module

B) New Rider/Feature – all modules that it is available on will be updated and "re-assigned" to the agents. Once they re-take 1 module that includes the new feature, the others will update within 24 hours.

How often will the training be required (both compliance and product)? Is recertification still required?

A) The training is now one and done – there is no longer a yearly requirement. The only time agents would need to re-take a module is if a new rider/feature becomes available. For compliance manual, there will be an alternative process identified outside of RegEd. More to come on that.

Call Sales Support with Questions!

866-322-7066

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North American's Annuity product training is completed through RegEd's training platform and can be accessed via the following link: https://secure.reged.com/TrainingPlatform/. If you do not already have a RegEd login, please register per the attached instructions. If you need assistance with a login you already have, you can call the RegEd Help Desk at 800-334-8322, option 2.

Once in RegEd, you may see North American listed as an affiliated company under which you can review and/or complete Annuity product training. If North American is not yet listed, you can still complete the product training by entering the Course IDs as shown below and per attached. The RegEd Basics attachment walks you through this process.

All agents **must** complete the Compliance & Annuities 101 course **AND** complete the individual or group product training for those products you will be selling and servicing.

15SFGNAC_01 – NAC Benefit Solutions Series
15SFGNAC_05 – NAC Traditional Fixed & SPIA
(Includes Guarantee Choice I and II, Boomer Annuity, Income SPIA)
15SFGNAC_07 – NAC Compliance & Annuities 101 – Required for ALL AGENTS
15SFGNAC_09 – NAC Retire Choice (includes Income Pay Plus & Income Pay Riders)
15SFGNAC_10 – NAC Additional Fixed Indexed Annuities (includes Income Pay Plus & Income Pay Riders)
(Includes Charter, Precision, Prizm Plus, Freedom Choice, Ten)
15SFGNAC_11 – NAC Charter Plus (includes Income Pay Plus & Income Pay Riders)
15SFGNAC_13 – NAC Income Choice with Threshold Participation Strategy REV 5-2016
15SFGNAC_15 – NAC Performance Choice Series with Threshold Participation Strategy REV 5-2016

Please let us know if you have any questions. Thank you!!

Thank you!

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RegEd

RegEd Basics

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Need To Know Terms

Term	Definition
RegEd	Website that we now use
ATP	Annuity Training Platform – this is the system that RegEd uses for product training.
Product Code	Code entered into RegEd to assign training (only used when training is not automatically assigned).
Producer Status Screen	Screen that shows all current product modules that have been assigned to the agent.

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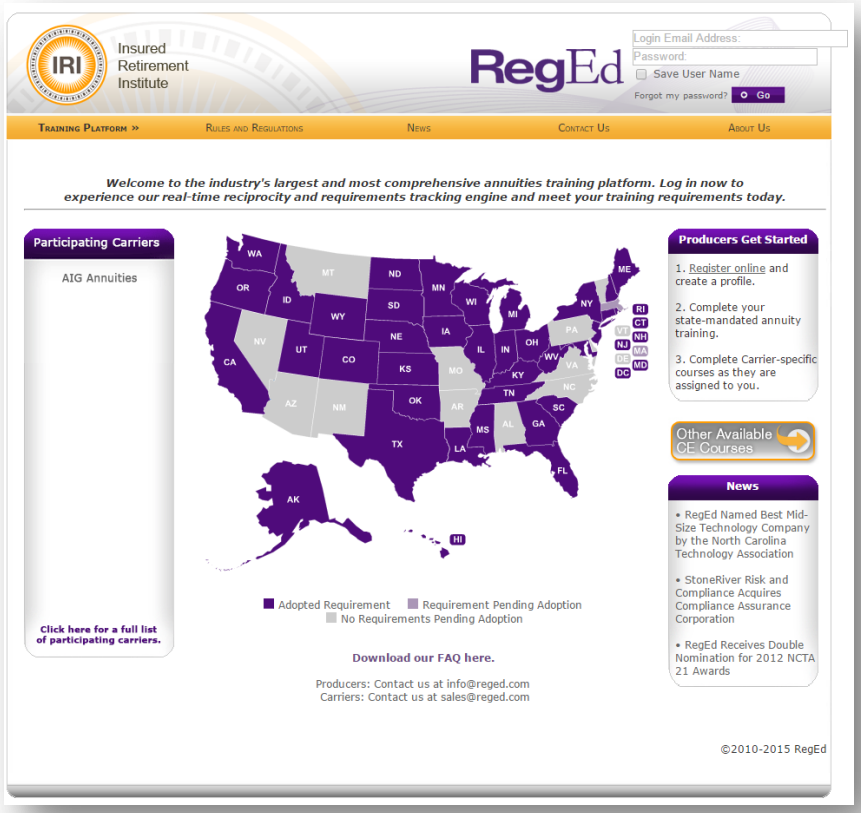
Logging In To ATP

Website:

https://secure.reged.com/TrainingPlatform/



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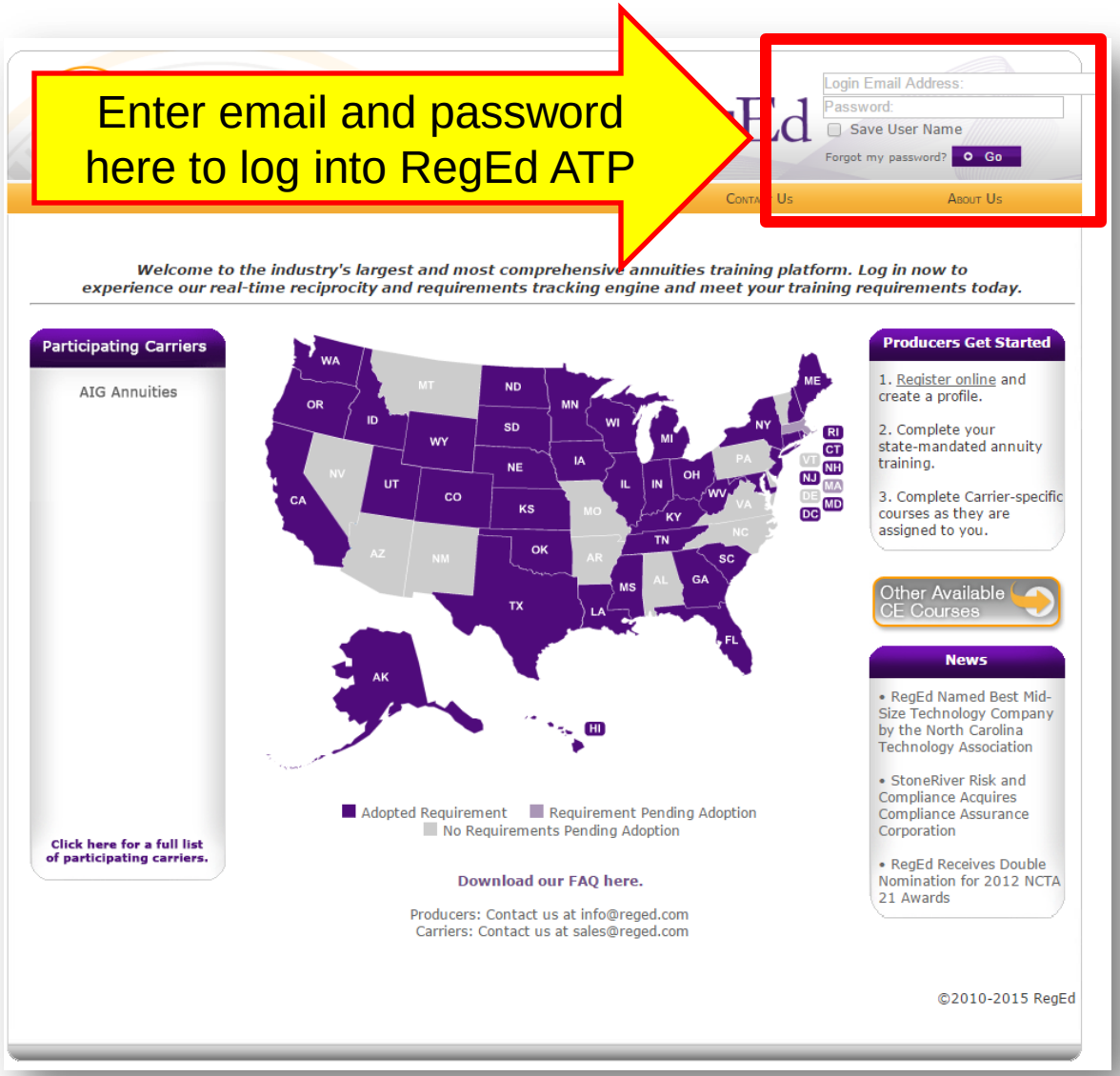
Logging In To ATP



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Logging In To ATP: First Time Registration

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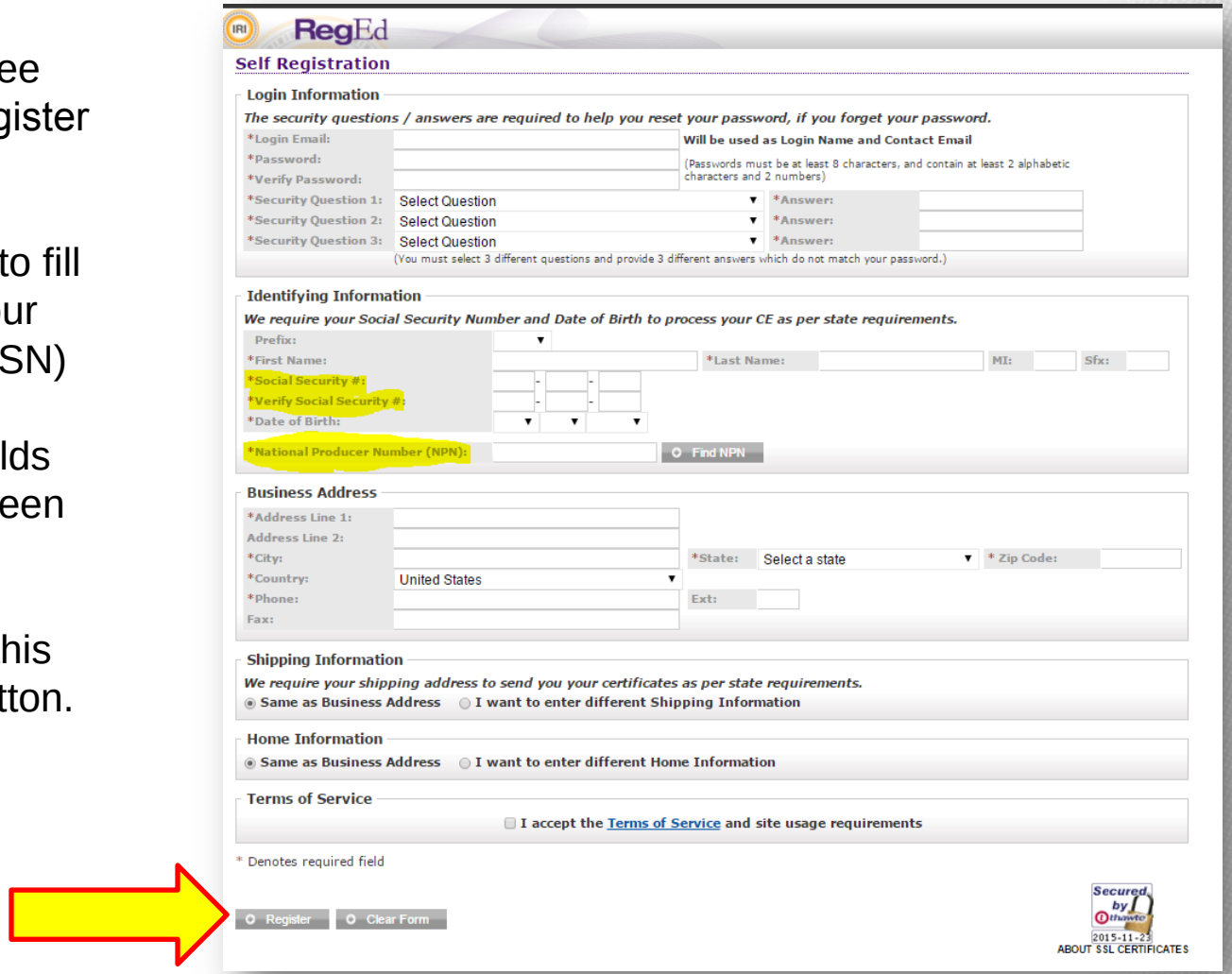
Logging In To ATP: First Time Registration

This is the form you will see when you click on the “register online” link.

To register, you will need to fill out this form, including your social security number (SSN) and National Producer Number (NPN). These fields are highlighted on the screen print.

Once you have filled out this form, click the register button.



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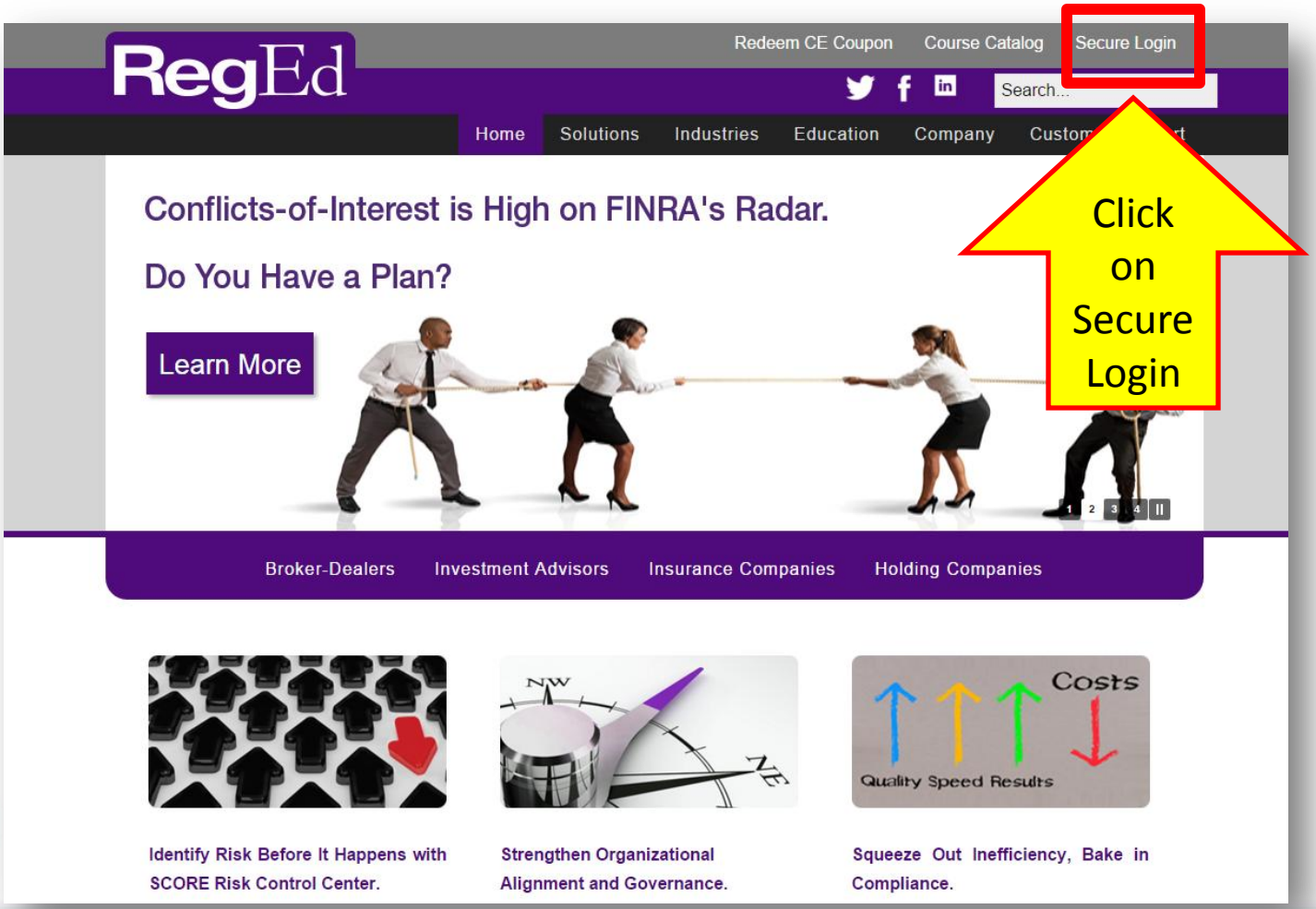
Logging In: Main RegEd Site

RegEd has multiple websites.
These are directions on how to login from other sites: www.reged.com



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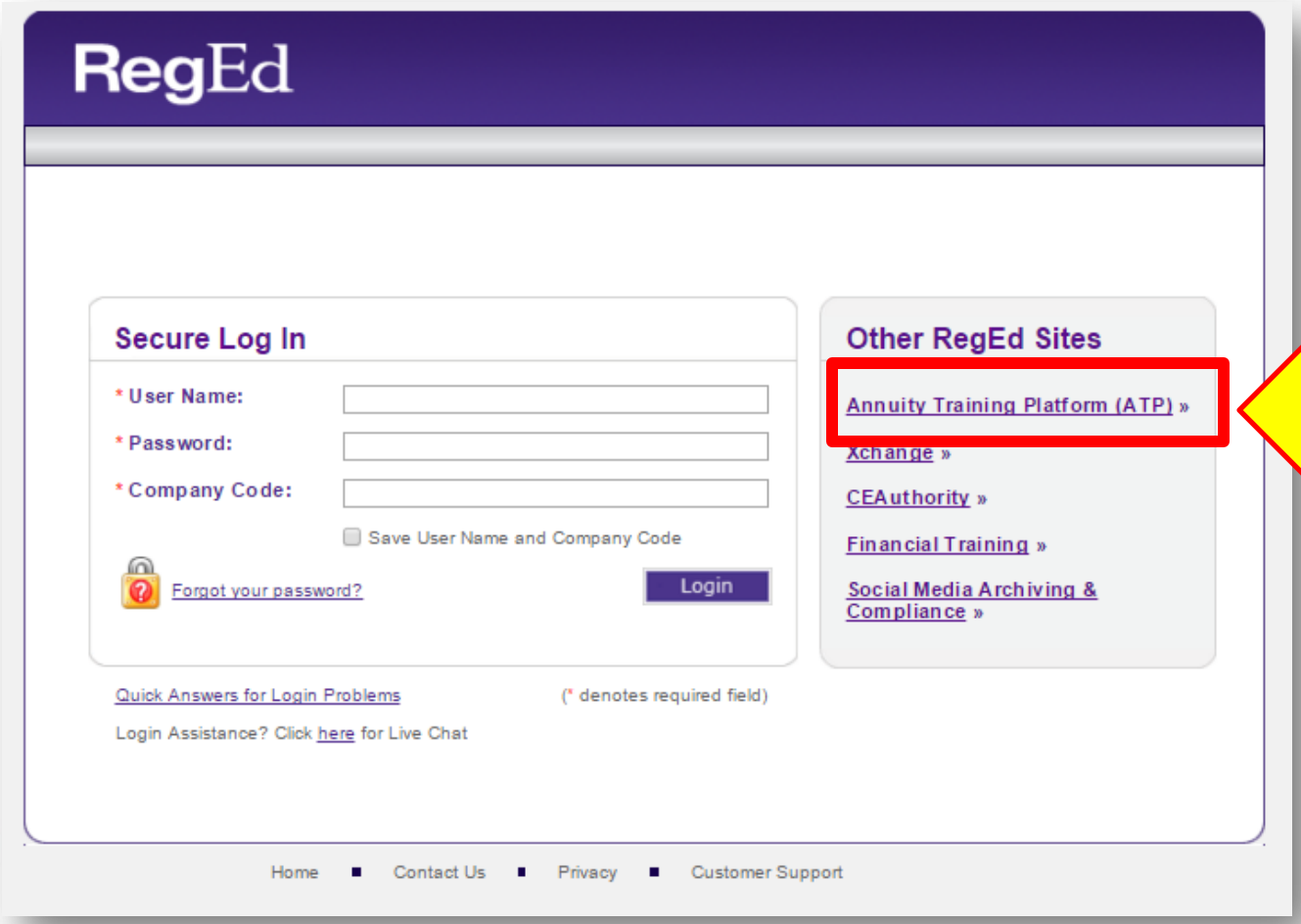
Logging In: Main RegEd Site

On this screen you need to click on “Annuity Training Platform (ATP)” Link. This will take you to the ATP site and you will follow previous directions to login.



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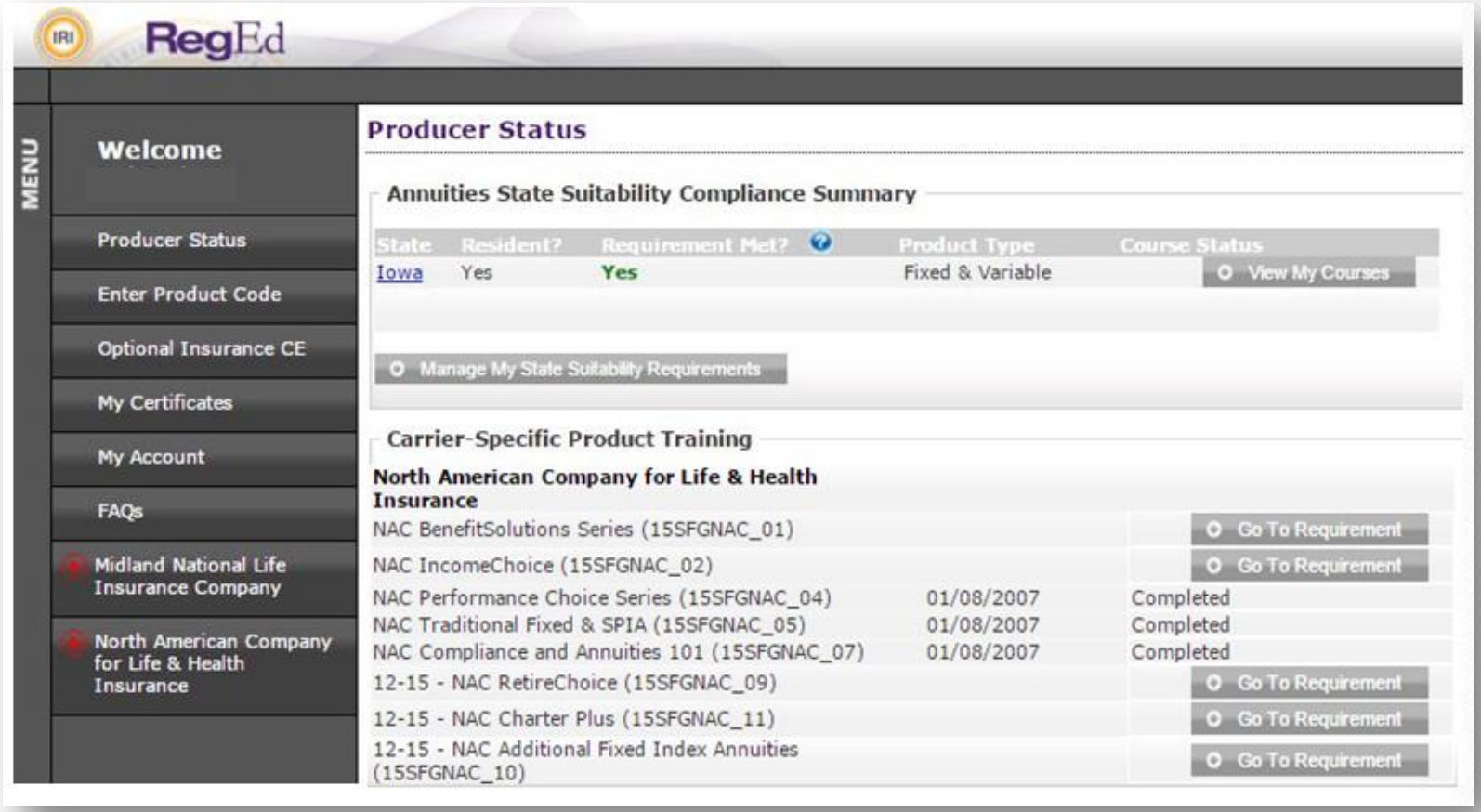
Navigating RegEd

Once an Agent has logged in – this is the screen they will see:



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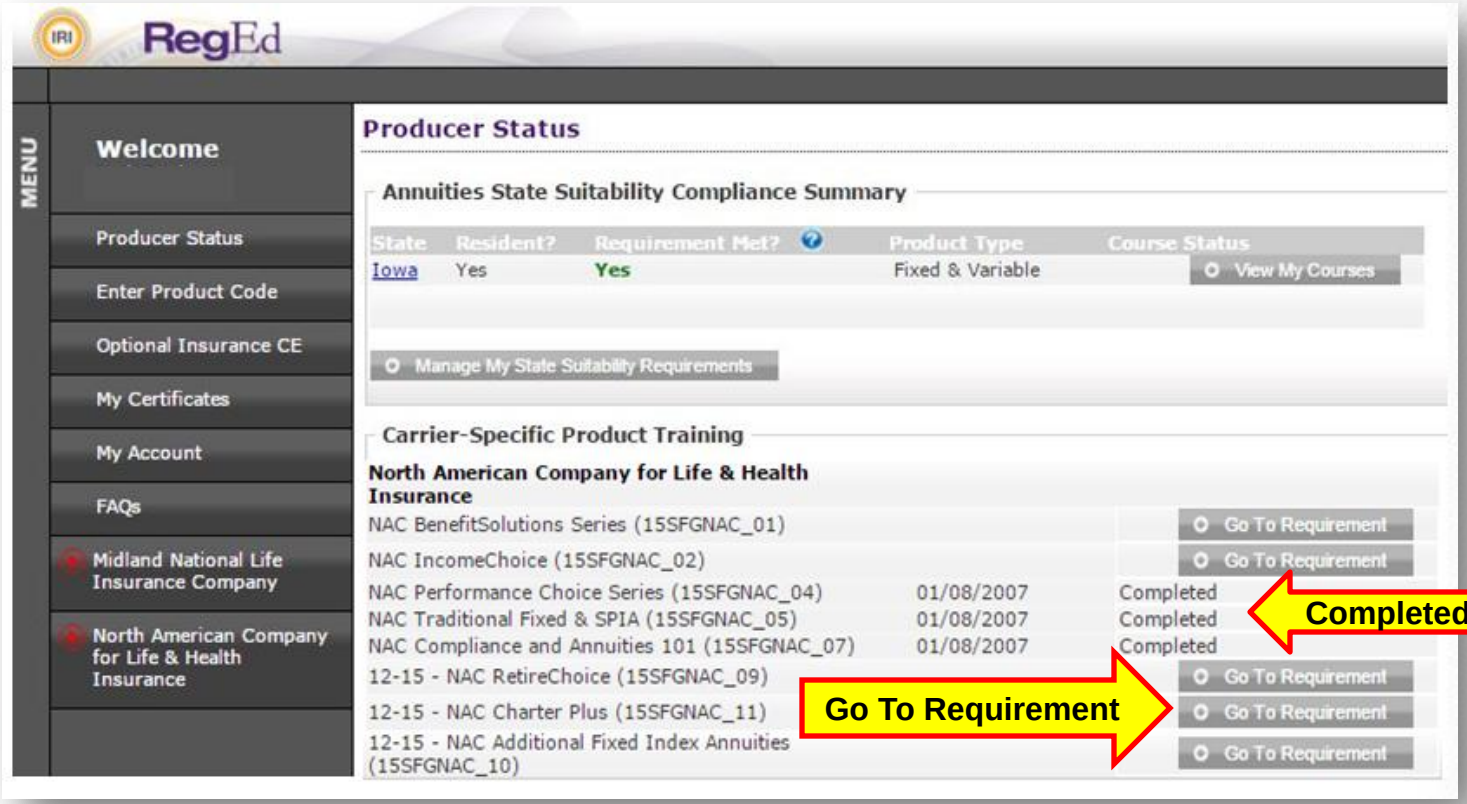
Navigating RegEd

Courses that are already completed will be marked "**completed**" and the agent can no longer review them.

Courses that are not yet completed will have this symbol by them: Go To Requirement
In order to take these course, the agent will click on the "Go To Requirement" Button.



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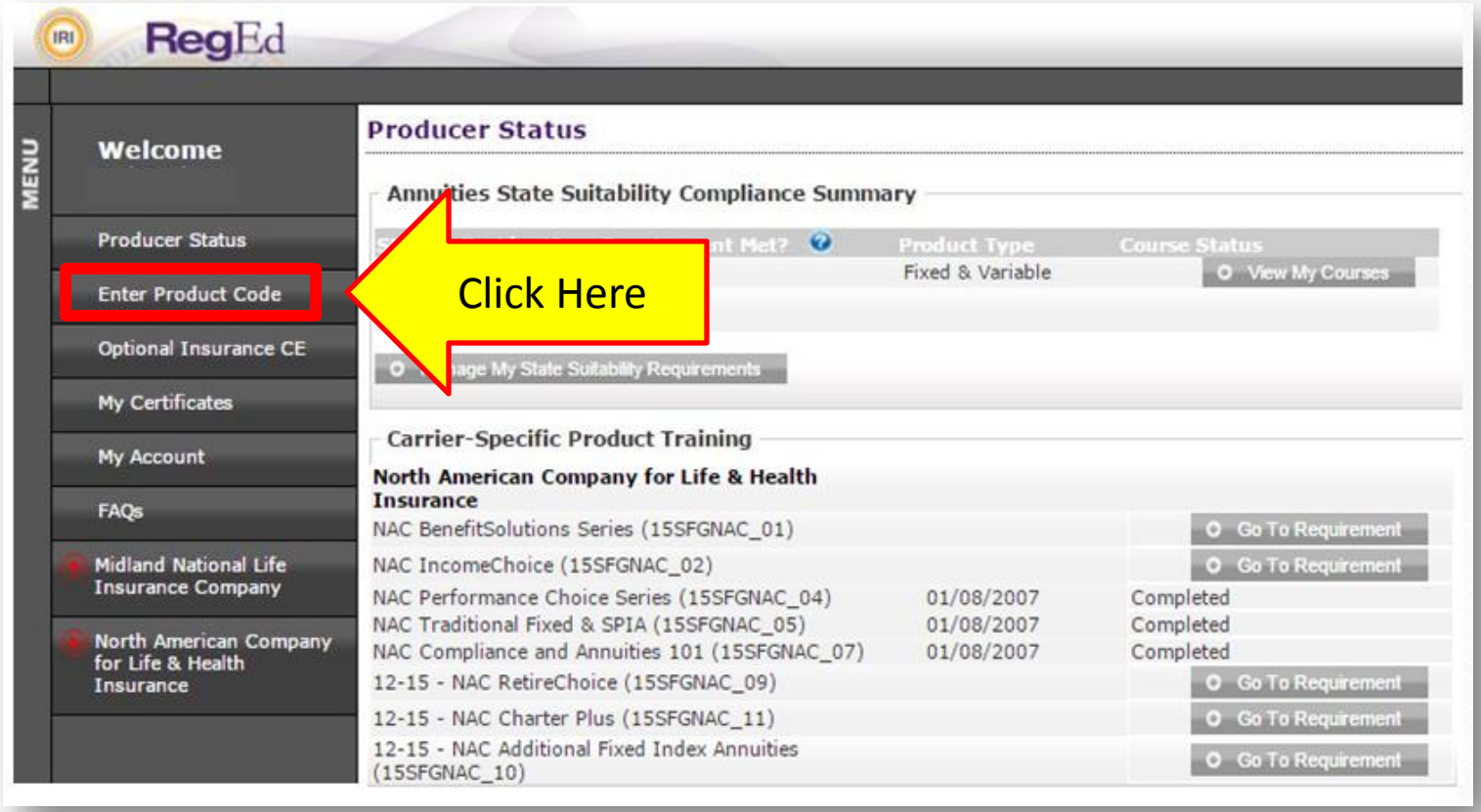
Navigating RegEd

If an agent wants to take a course that is NOT assigned to them, they will click on the "Enter Product Code" Button



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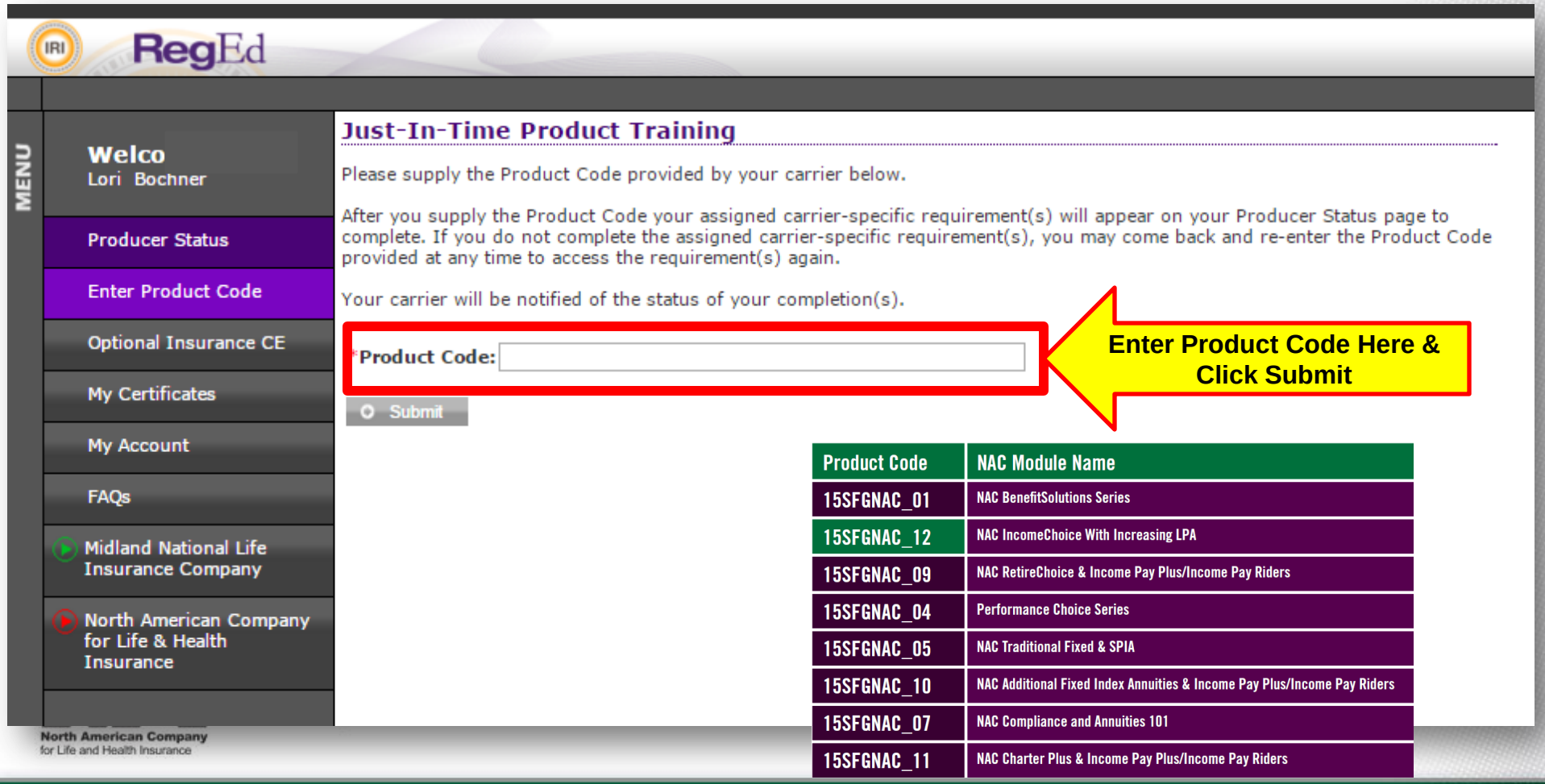
Navigating RegEd

The agent needs to enter the Product Code in that correct field and then click submit. This will allow them to see the training on their Producer Status Screen



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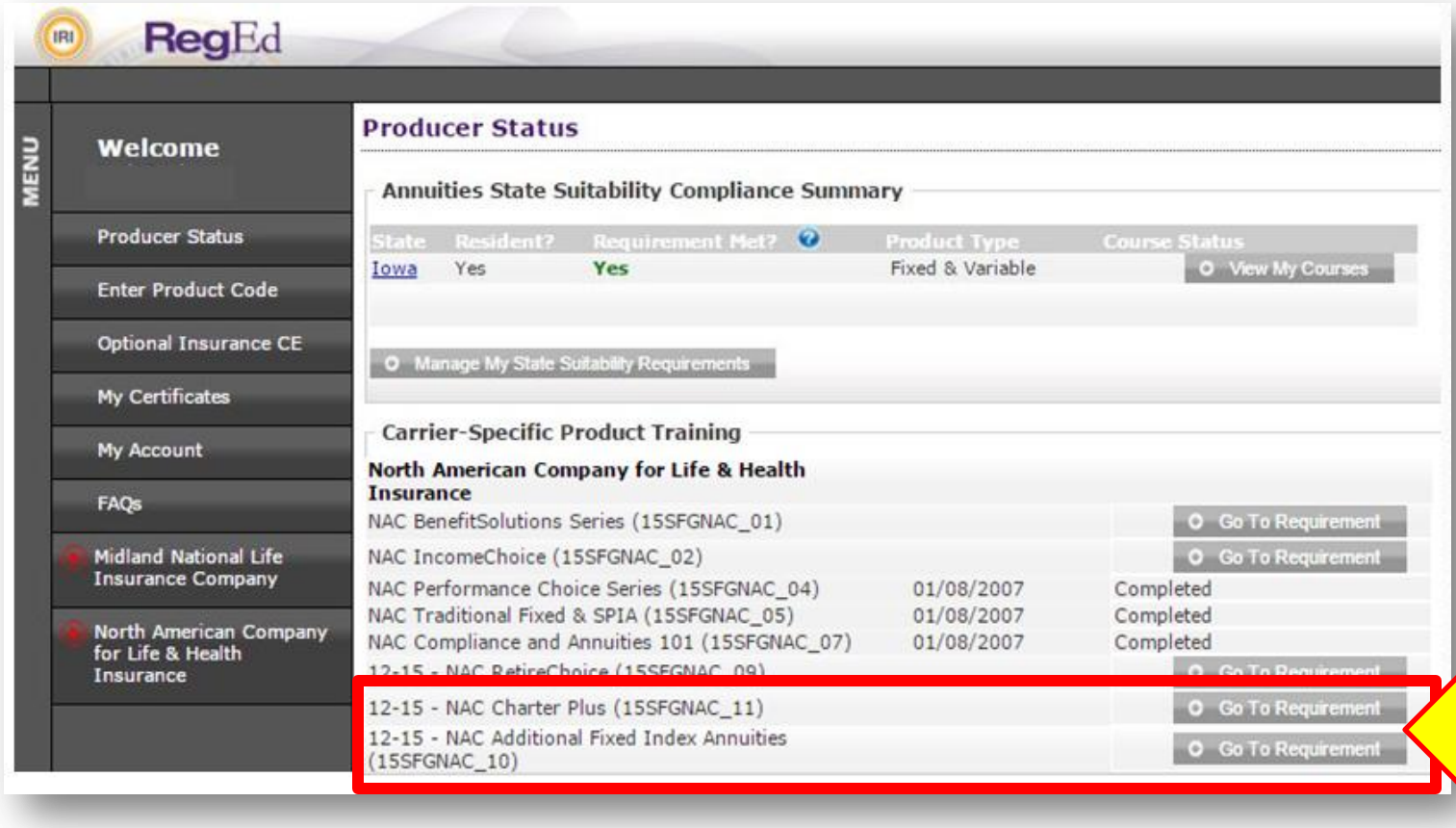
Navigating RegEd

The agent will now see the training on their Producer Status Screen:



Now Training Shows up!

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