



## Accessing New York Life Annuity Product Training on RegEd

Please follow these procedures:

1. Click on this URL link <https://secure.reged.com/TrainingPlatform> which will bring you to the RegEd Annuity Training Platform (ATP) home page. If the link is not active, please copy and paste this address in your internet browser.
2. If you have never registered in RegEd, select "Sign Up" in top right corner of the site and complete the registration form. The registration page must be filled out in order to identify the training requirements that are applicable to you. Be sure to list all jurisdictions that you do business in. Once you complete the registration page, click on the "I accept the terms of service" box at the bottom of the screen to continue.
3. Now that registration is complete, the left side bar has the training choices. Click on "Producer Status" which will show the State annuity general training courses and carrier specific annuity product training at the bottom of the screen.
4. Most producers of New York Life annuities will have immediate access to the product training courses upon registering. If New York Life is not listed in the "Carrier Specific Product Training" section, you will need to call our Sales Desk at 888-474-7725. You will be given a product code which will give you immediate access to that product's training course. Just click on the "Enter Product Code" selection on the left navigation bar. Within 24 hours of using the product code, you will be given access to all other NYL training courses.
5. To view and track your training completions to date, click on the "My Courses" selection where you will find your course training history.

### Support and Contacts

- For instructions with screen shots, please refer to the attached RegEd "Getting Started Guide".



RegEd  
GSG-ATP\_Produce

- If you need assistance with NYL's product training, please call the NYL Sales Desk at 888-474-7725.
- For assistance with issues related to the RegEd web site, please call the RegEd Customer Service Unit at 800 334-8322.



ATP Producer

Getting Started Guide

## Annuities Training Platform Getting Started Guide for Producers

As the leading industry platform with several large carriers, RegEd's Annuity Training Platform is the solution for reducing this training burden and keeping producers focused on selling. The platform:

- ... Provides the ability for producers to meet multiple carrier requirements on one platform. RegEd's Annuity Training Platform makes it easy for producers to register and take the necessary state suitability and carrier-specific product training courses.
- ... Is the one place where distributors can see an agent's complete compliance profile for annuities training. This includes both the state suitability requirements and carrier-specific product training.
- ... Ensures producer compliance with the state suitability requirements for the states in which they sell annuities. The platform has an extensive rule base to determine reciprocity rules and initial and ongoing training requirements.
- ... Already has several of the leading carriers and their producer populations participating on the platform.

Here is how producers can get started:

### Producer Registration

- 1) Go to <https://secure.reged.com/TrainingPlatform/>.
- 2) Select **"Sign Up"** in the top right hand corner.

### 3) Complete the registration form.

**RegEd**

Create Profile > Payment Information License Information

#### Annuities Training Platform Sign Up

**Login Information**

The security questions / answers are required to help you reset your password, if you forget your password.

\*Login Email:  Will be used as Login Name and Contact Email

\*Password:  (Passwords must be at least 8 characters, and contain at least 2 alphabetic characters and 2 numbers)

\*Verify Password:

\*Security Question 1:  Select Question  Answer:

\*Security Question 2:  Select Question  Answer:

\*Security Question 3:  Select Question  Answer:

(You must select 3 different questions and provide 3 different answers which do not match your password.)

**Identifying Information**

We require your Social Security Number and Date of Birth to process your CE as per state requirements.

Prefix:

\*First Name:  \*Last Name:  MI:  Sfx:

\*Social Security #: --

\*Verify Social Security #: --

\*Date of Birth: / /

\*National Producer Number (NPN):  Find NPN

**Business Address**

\*Address Line 1:

Address Line 2:

\*City:  \*State:  Select a state  \*Zip:

\*Phone:  Ext:

Fax:

**Shipping Information**

We require your shipping address to send you your certificates as per state requirements.

Same as Business Address  I want to enter different Shipping Information

**Terms of Service**

I accept the [Terms of Service](#) and site usage requirements

\* Denotes required field

### 4) Indicate the state(s) where you sell or will be selling an annuity product and supply the required information.

**IRI RegEd**

#### Annuities State Suitability Product Training

**Manage Annuities Product Training Requirements**

Please indicate the state(s) where you sell or plan to sell annuity products:

Delete?	State	Resident?
X	Select a State <input type="text"/>	<input type="checkbox"/>

## Producer Status: State Suitability Training

- 1) In order to access your state suitability training (i.e. the 4-hour state requirement, select “**Order Course**”.

The screenshot shows the RegEd interface for a user named Allison Harris. The main heading is "Producer Status". On the left is a navigation menu with options: "Producer Status" (selected), "Enter Product Code", "Optional Insurance CE", "My Account", and "My Certificates".

The main content area is titled "Annuities State Suitability Compliance Summary" and contains a table with the following data:

State	Resident?	Requirement Met?	Course Status
<a href="#">Iowa</a>	Yes	No	<input type="button" value="Order Course"/>
<a href="#">Ohio</a>	No	No	<input type="button" value="Order Course"/>
<a href="#">Wisconsin</a>	No	No	<input type="button" value="Order Course"/>

Below the table is a button: . A "Print" icon is located in the top right corner of the content area.

Below this section is another heading: "Carrier-Specific Product Training". It contains a table with columns: "Requirement", "Completion Date", and "Requirement Status". Below the table, a message states: "You currently have no carrier-specific product training assigned to you. If you need to complete product training, please contact your carrier(s) to obtain access."

- 2) Indicate whether you would like to complete your state suitability training course **with or without** Continuing Education (CE) credit. NOTE: many states *do not* allow post-ordering of CE credit once a course has been completed.

The screenshot shows the "Product Training & CE Options" section of the RegEd interface. It asks the user: "Do you want to receive CE credit(s), where available, with your Product Training completion(s)?"

There are two radio button options:

- I want to receive CE credit(s) with my Product Training completion(s)
- I DO NOT want to receive CE credit(s) with my Product Training completion(s)

A warning message is displayed in red text: "Warning! Ordering CE after the course is completed is NOT allowed for most states." At the bottom, there are two buttons:  and .

- 3) Select the course(s) and/or CE credit you wish to order and complete your order. To view which courses are reciprocal (i.e. these courses have been approved in the states listed by the participating carriers on the ATP platform) select the **hyperlink** next to “Annuities State Suitability Approved In:” section.

**Available Courses and CE Credit**

To receive credit you must select **Add** for the credits desired. If no credits appear, the courses you have completed or ordered are not approved for that state or professional designation. To review your completed order, select **Proceed**.

Search Titles Within List

Add Course	Credits	Course Rating	Price
<input type="checkbox"/> Add State or Professional Designation CE <input type="checkbox"/> NAIC Suitability in Annuity Transactions Model Regulation (390) <a href="#">Annuities State Suitability Approved In: IA, OH, WI</a> <input type="checkbox"/> CE Credit for Ohio Ohio State Fee	4 Annuity ClearCert Annuities Approved	- Advanced	\$0.00 \$15.00 \$4.00
<input type="checkbox"/> Suitability of Annuity Transactions as Required by the State of Ohio <a href="#">Annuities State Suitability Approved In: IA, OH, WI</a> <input type="checkbox"/> CE Credit for Iowa Iowa State Fee	4 Annuity Products ClearCert Annuities Approved		\$0.00 \$15.00 \$4.00
<input type="checkbox"/> Suitability of Annuity Transactions as Required by the State of Wisconsin <a href="#">Annuities State Suitability Approved In: IA, OH, WI</a> <input type="checkbox"/> CE Credit for Wisconsin* <b>This course must be ordered</b>	4 Annuity Suitability ClearCert Annuities Approved		\$0.00 \$15.00

- 4) Once your order has been completed, select “**Go To Course**” to access the training.

**Producer Status**

**Annuities State Suitability Compliance Summary**

State	Resident?	Requirement Met?	Course Status
<a href="#">Iowa</a>	Yes	No	<input type="button" value="Go to Course"/>
<a href="#">Ohio</a>	No	No	<input type="button" value="Go to Course"/>
<a href="#">Wisconsin</a>	No	No	<input type="button" value="Go to Course"/>

**Carrier-Specific Product Training**

Requirement	Completion Date	Requirement Status
You currently have no carrier-specific product training assigned to you. If you need to complete product training, please contact your carrier(s) to obtain access.		

- To update your product training requirements (i.e. add/remove states) select **Manage My State Suitability Requirements**.

## **Producer Status: Carrier-Specific Product Training**

- To access carrier-specific product training that has been assigned to you select **“Go To Requirement”** for the applicable training listed on Producer Status. NOTE: if you *do not* see a carrier’s product training assigned to you, please contact your carrier(s) in order to obtain access to the training(s).

The screenshot displays the RegEd interface for a user named Allison Harris. The page is titled "Producer Status" and includes a "Print" button. It is divided into two main sections: "Annuities State Suitability Compliance Summary" and "Carrier-Specific Product Training".

**Annuities State Suitability Compliance Summary**

State	Resident?	Requirement Met?	Course Status
<a href="#">Iowa</a>	Yes	No	<a href="#">Go to Course</a>
<a href="#">Ohio</a>	No	No	<a href="#">Go to Course</a>
<a href="#">Wisconsin</a>	No	No	<a href="#">Go to Course</a>

[Manage My State Suitability Requirements](#)

**Carrier-Specific Product Training**

Requirement	Completion Date	Requirement Status
<b>CARRIER 1 PRODUCT TRAINING</b>		
2010 Annual Compliance Meeting (ANN_ACM)		<a href="#">Go To Requirement</a>

- 2) To access carrier-specific product training **records of completion** select the training module from the left-hand navigation menu and select the **Course History** option in **My Courses**.

The screenshot shows the 'My Courses' page with the 'Course History' tab selected. The page contains several informational paragraphs and a table with the following headers: Course Name, State or Professional Designation CE Status, Course Status, Course Completion Date, Print Record / E-cert, and Course Library. The table body is currently empty.

## Enter Product Code

- 1) If you have a product training code provided by your carrier, select “**Enter Product Code**” via the left-hand navigation menu and enter the product code provided. Once your product code has been supplied you will be able to access it via Producer Status.

The screenshot shows the 'Just-In-Time Product Training' page. On the left is a navigation menu with 'Enter Product Code' selected. The main content area includes instructions to supply a product code, a text box for the code, and a 'Submit' button. The text states: 'Please supply the Product Code provided by your carrier below. After you supply the Product Code your assigned carrier-specific requirement(s) will appear on your Producer Status page to complete. If you do not complete the assigned carrier-specific requirement(s), you may come back and re-enter the Product Code provided at any time to access the requirement(s) again. Your carrier will be notified of the status of your completion(s).'

## Optional Insurance CE

- 1) To view the Optional Insurance CE courses select “**Optional Insurance CE**” via the left-hand navigation menu.

- 2) Select **“Proceed”** to complete additional courses available to you at a discounted rate.

**Optional Insurance CE**

RegEd's course library with more than 300 approved insurance courses is available to all participating producers at discounted rates. Courses are only \$6.00 and include a state certificate of completion. Course topics include:

- Ethics
- Long Term Care
- Life & Health
- Property & Casualty
- Adjuster
- Professional Designations
- ...and many more!

To access RegEd's vast library of training to meet your continuing education needs please select the Proceed button below.

If you have any questions, please contact RegEd Customer Support at 800.334.6322  
Monday through Friday, 8 am to 8 pm Eastern

[Proceed](#)

## My Certificates

- 1) To view CE certificates of completion that have been issued to you select **“My Certificates”**.

**My Certificates**

A paper certificate will be mailed to you. [Print certificate](#) [Request a paper certificate](#)

Please ensure your pop-up blocker is disabled when downloading your certificate.

[Download My Transcript](#) Page 1

Provider	License Type	State (Course #)	Course Name (Course ID)	Completion Date	Status	Certificate	Print Rules
You currently have no certificates to view or print.							

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