New York Life STC/XCEL Partnership Kick-off

December 2020

XCEL
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STC/XCEL Designated Support Staff

Callie Salvisburg Castles
Customer Success Manager

Patrick Fraley
XCEL Vice President, Operations

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Agenda

- Welcome/Program Kick-Off
- STC/XCEL Support Team Introductions
- Candidate Enrollment Process
- Candidate Materials & Study Best Practices
- Partner & General Office Reports
- Next Steps

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Candidate Pre-Licensing Enrollment Process

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XCEL – Candidate Enrollment Flyer

XCEL Enrollment Page:

1. Using the Partner Flyer, Select “Click Here to Begin Student Registration”
2. Save the PDF on your Desktop for easy Enrollment

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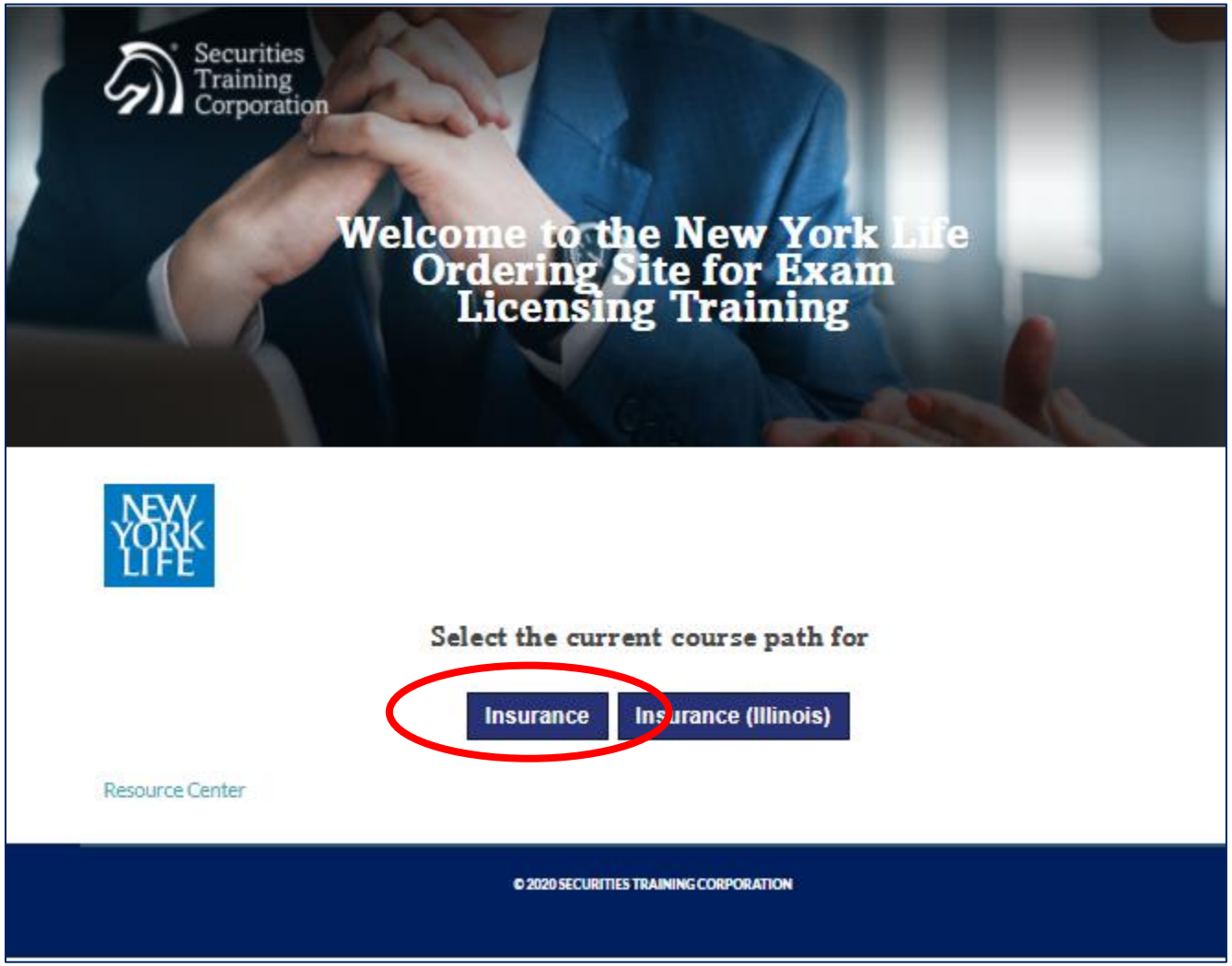
New York Life Candidate Enrollment Landing Page



XCEL Enrollment Page:

1. Select “Insurance” to Enroll Candidates in XCEL Pre-Licensing Course
2. Book Mark Enrollment Site for easy Candidate Enrollment –
   - http://info.stcusa.com/new_york_life_enrollment_page

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Select English or Spanish

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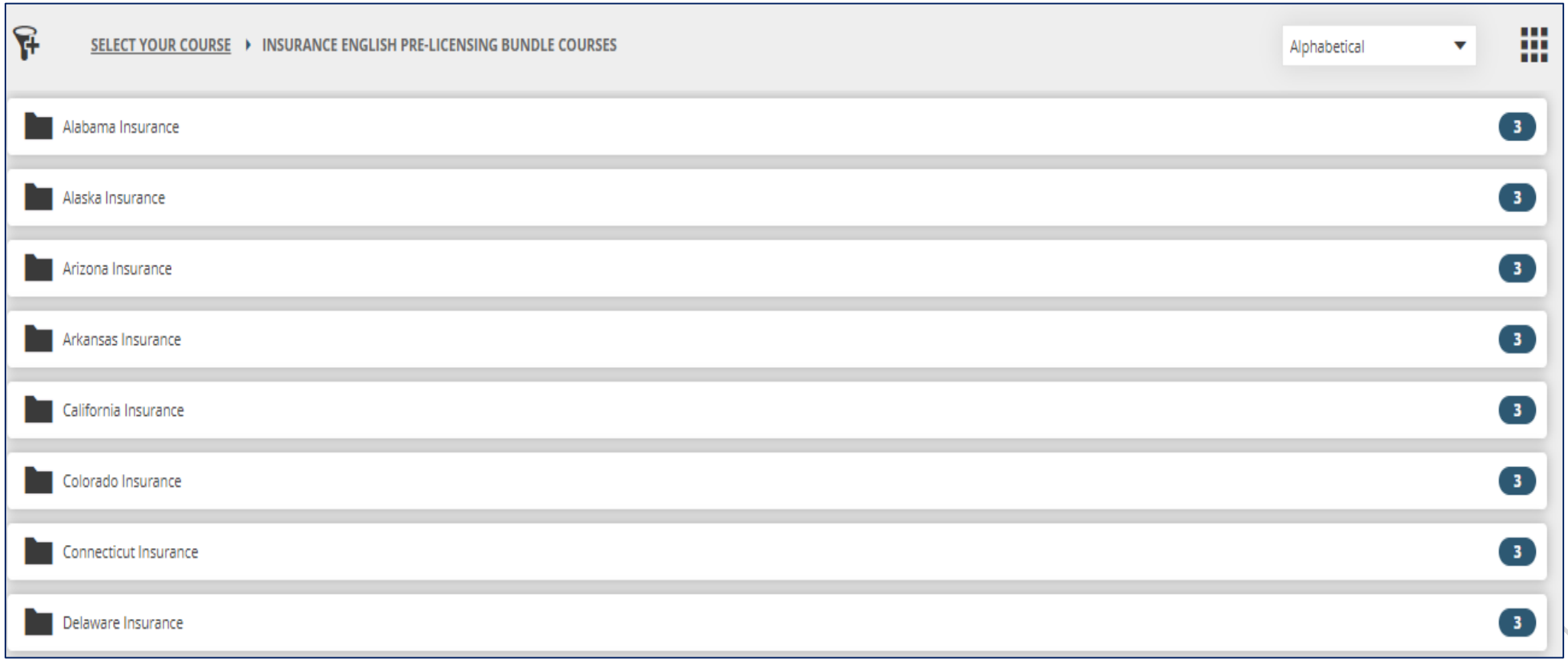
Select Candidate's State of Study



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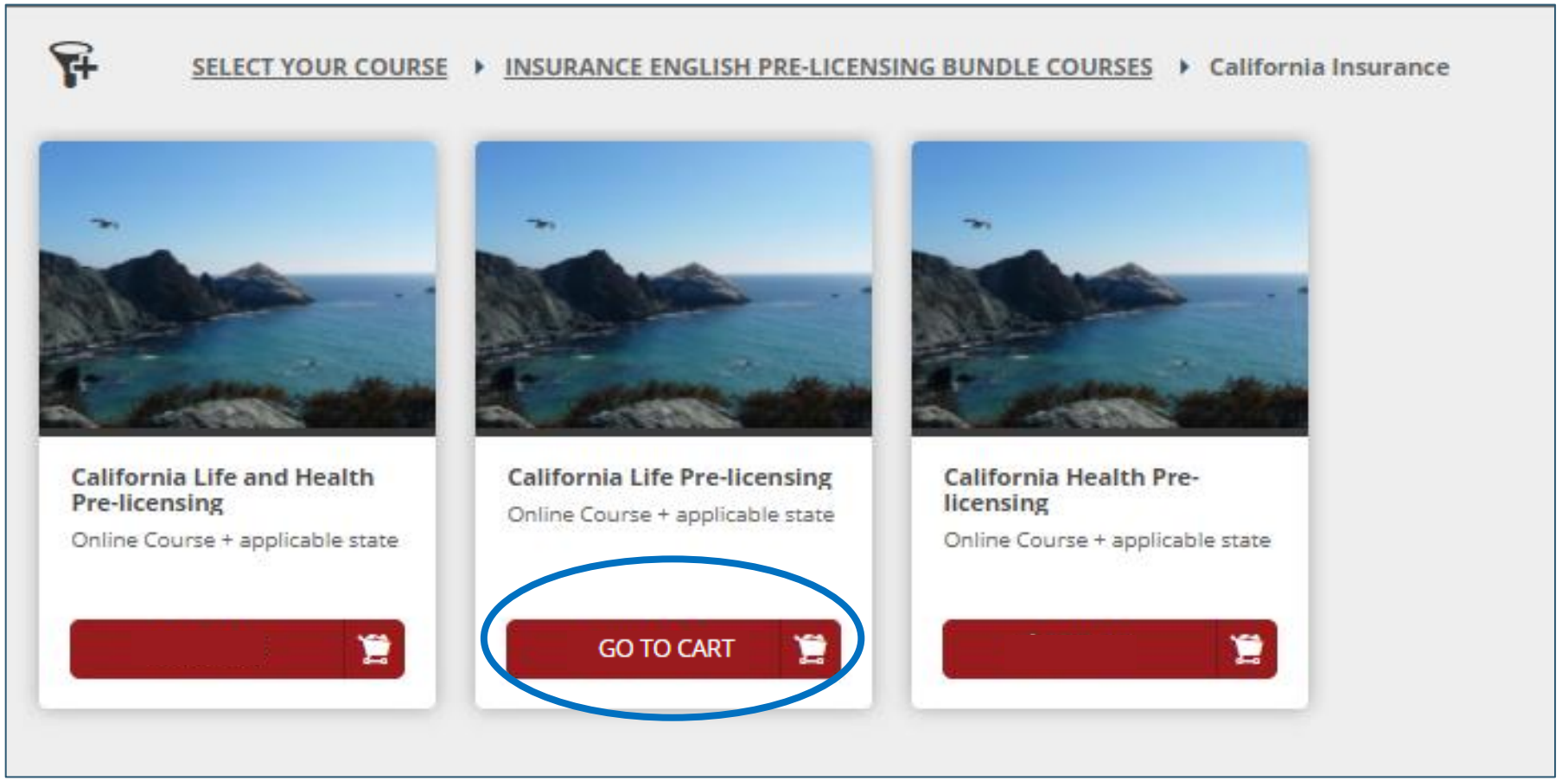
Select Pre-Licensing Bundle



XCEL Enrollment Page:

1. Select the Pre-Licensing Course –
   1. Life & Health
   2. Life Only
   3. Health Only
2. Select “GO TO CART”

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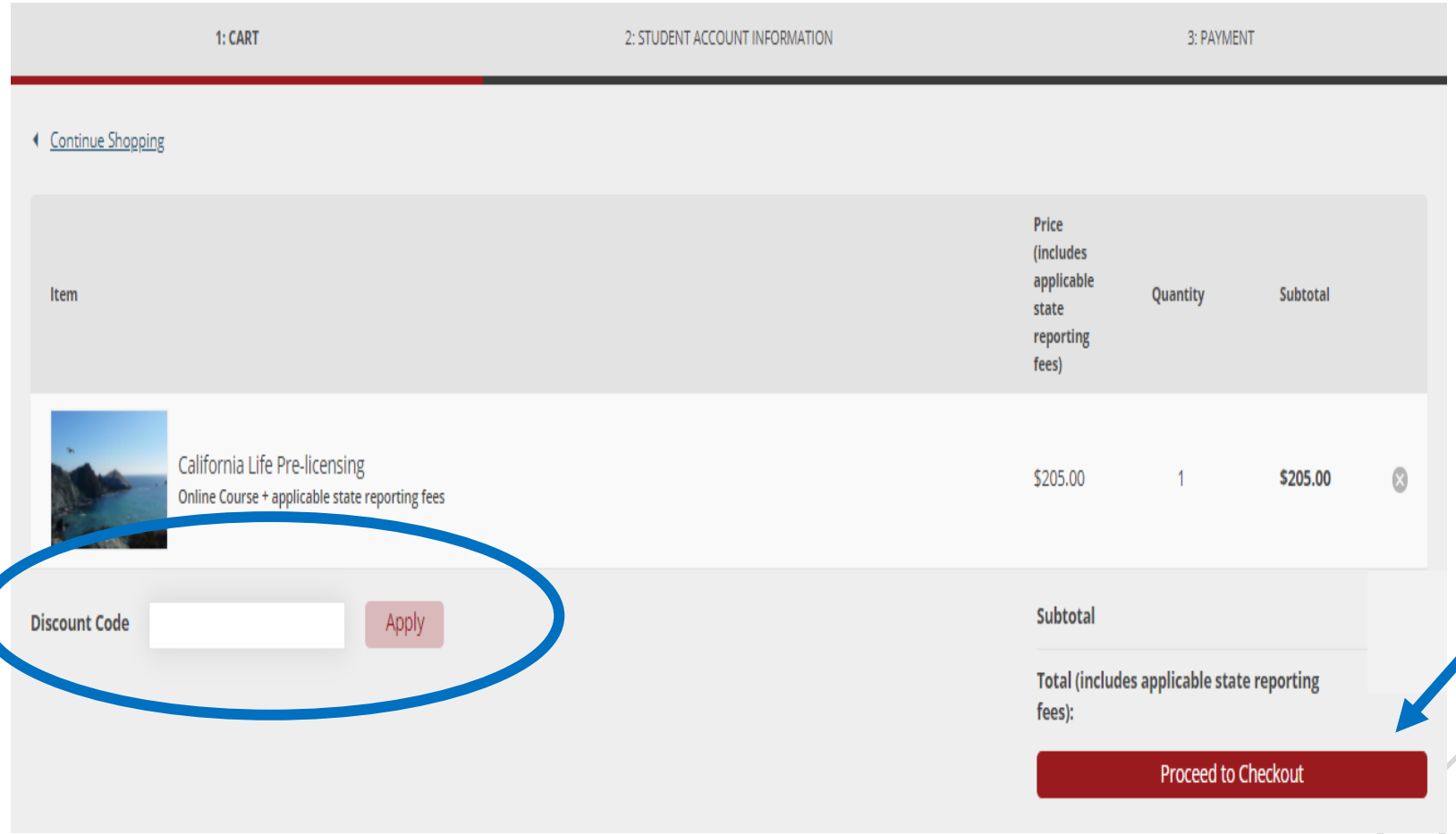
Select Pre-Licensing Bundle

1. Enter you Partner Discount Code from Enrollment Flyer
2. Select “Apply” Discount Code
3. Price will drop to $0
4. Select “Proceed to Checkout”



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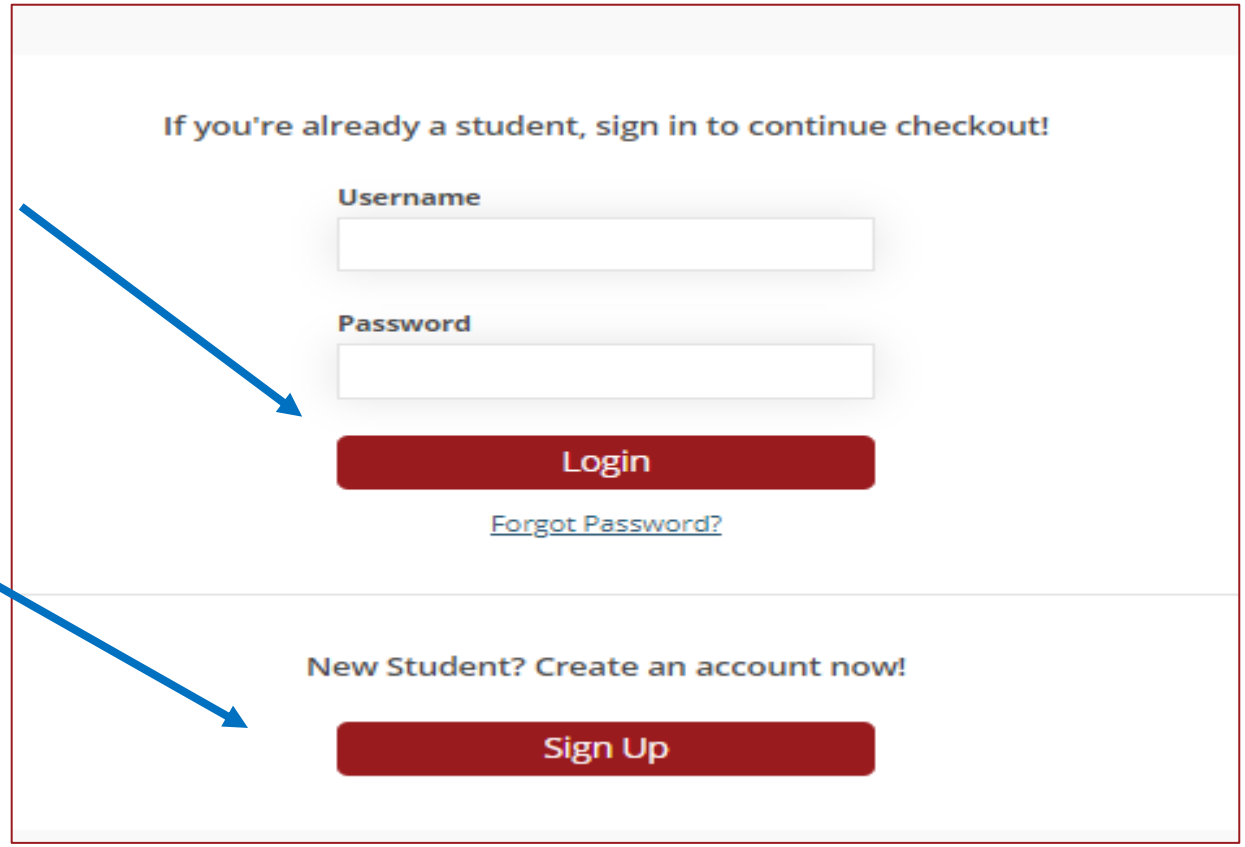
Select Sign Up New Student (Candidate)



Select “New Student (Candidate)” to create a new XCEL candidate Account.

If the Candidate is already Enrolled in XCEL materials and need to Enroll in additional materials, select “Login”.

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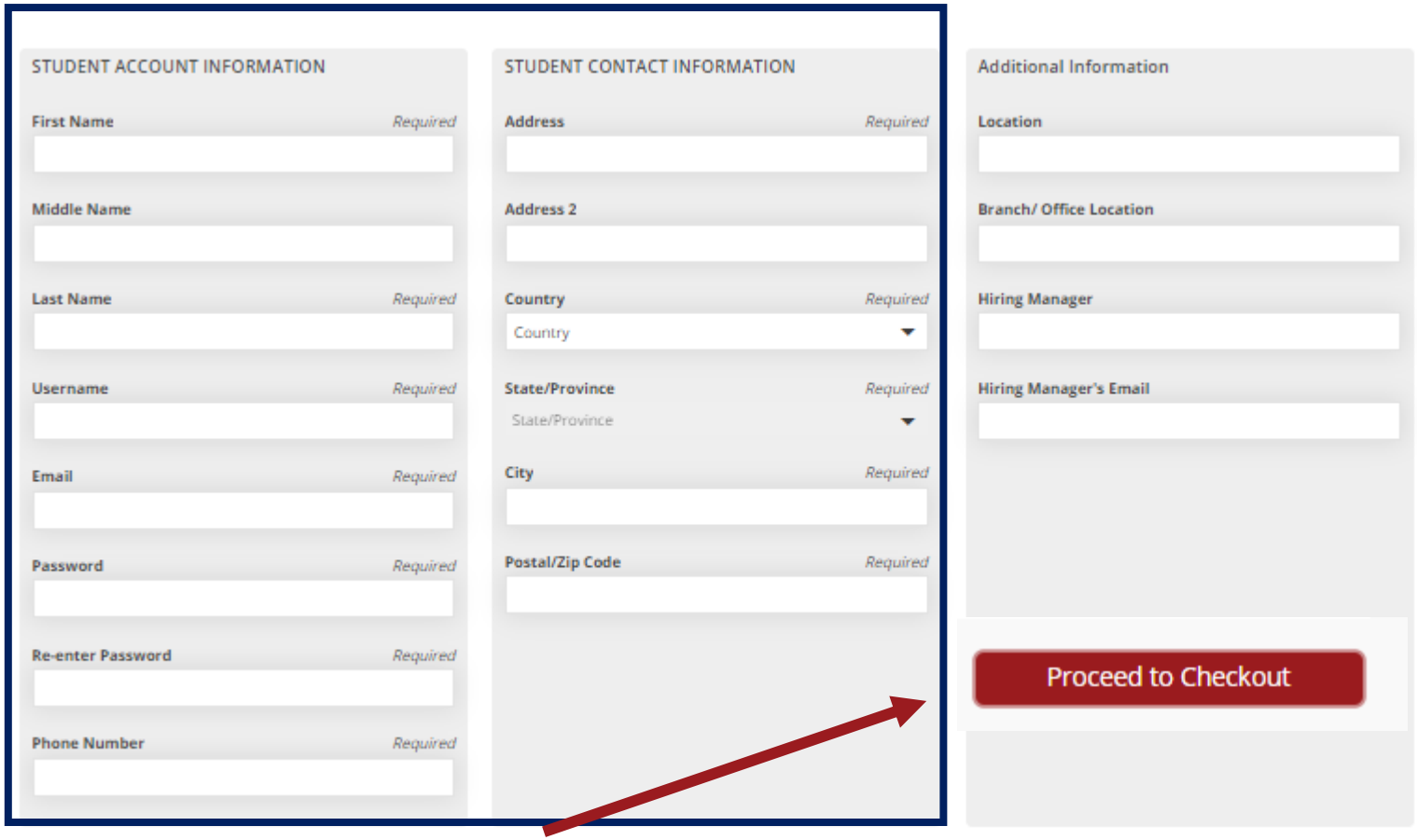
Complete ***Required*** Candidate Account Information

Candidate Account Information Form



Please complete only the REQUIRED fields to set-up a new Candidate Account.

Username & Password are set during Candidate Account set-up.

- Keep Passwords general for each Partner
- Usernames can be Candidates email address
- Candidates reset Password once in Homeroom.

Please review Completed Form before selecting “Proceed to Checkout”

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Complete Candidate Account Information **Example**

STUDENT ACCOUNT INFORMATION

First Name *Required*
Callie

Middle Name

Last Name *Required*
Castles

Username *Required*
callie.castles@colibrigroup.com

Email *Required*
callie.castles@colibrigroup.com

Password *Required*
NYL2020

Re-enter Password *Required*
NYL2020

Phone Number *Required*
2124852376

STUDENT CONTACT INFORMATION

Address *Required*
501 N Broadway

Address 2

Country *Required*
United States

State/Province *Required*
Missouri

City *Required*
Saint Louis

Postal/Zip Code *Required*
63102

Additional Information

Location

Branch/ Office Location

Hiring Manager

Hiring Manager's Email

Proceed to Checkout

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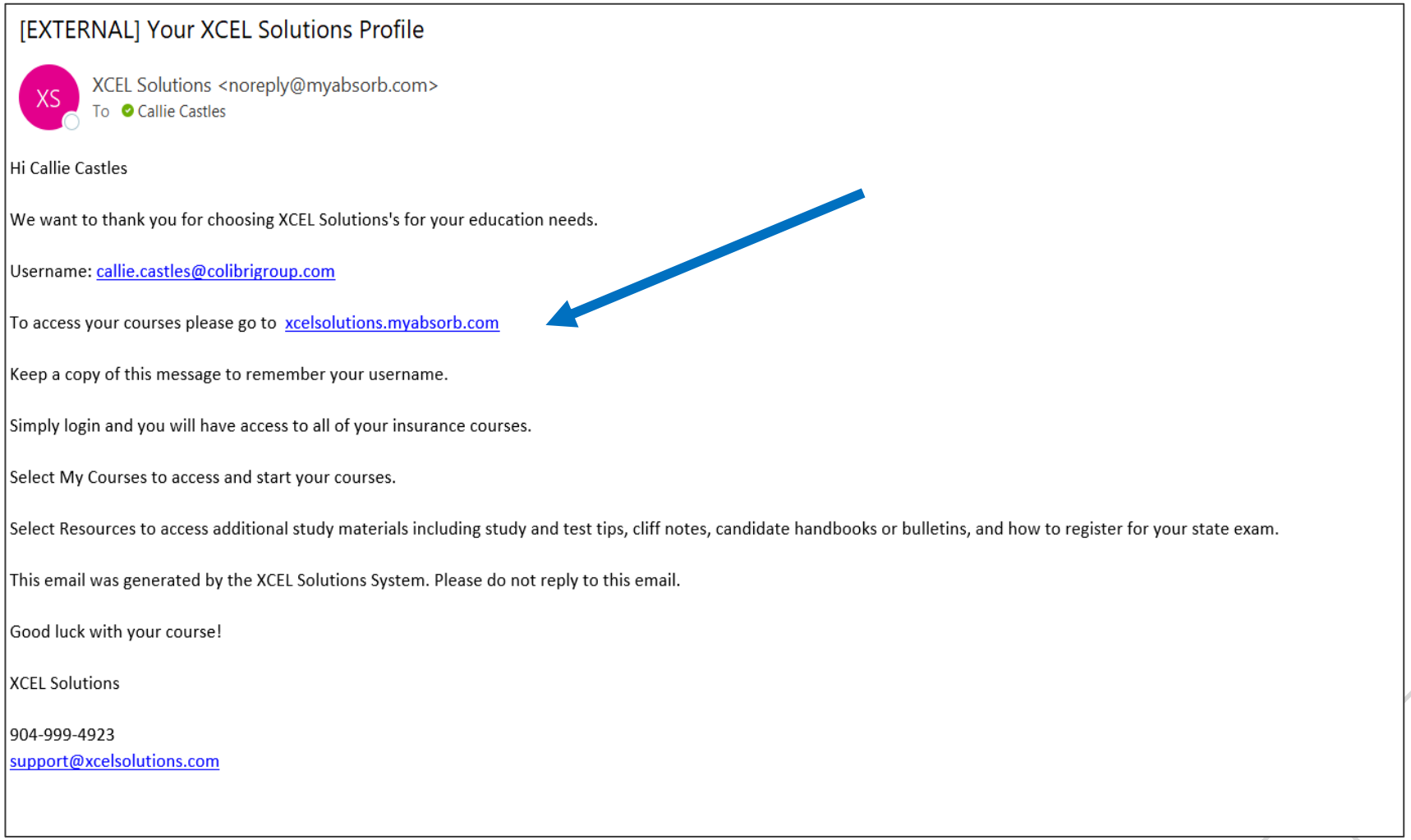
Candidate Enrollment Email

Candidate Username and Password will be what was entered during the XCEL New Candidate Enrollment Process.

The link to the XCEL Platform - **https://xcelsolutions.myabsorb.com/#/login**



[EXTERNAL] Your XCEL Solutions Profile

XS

XCEL Solutions <noreply@myabsorb.com>
To Callie Castles

Hi Callie Castles

We want to thank you for choosing XCEL Solutions's for your education needs.

Username: callie.castles@colibrigroup.com

To access your courses please go to xcelsolutions.myabsorb.com

Keep a copy of this message to remember your username.

Simply login and you will have access to all of your insurance courses.

Select My Courses to access and start your courses.

Select Resources to access additional study materials including study and test tips, cliff notes, candidate handbooks or bulletins, and how to register for your state exam.

This email was generated by the XCEL Solutions System. Please do not reply to this email.

Good luck with your course!

XCEL Solutions

904-999-4923
support@xcelsolutions.com

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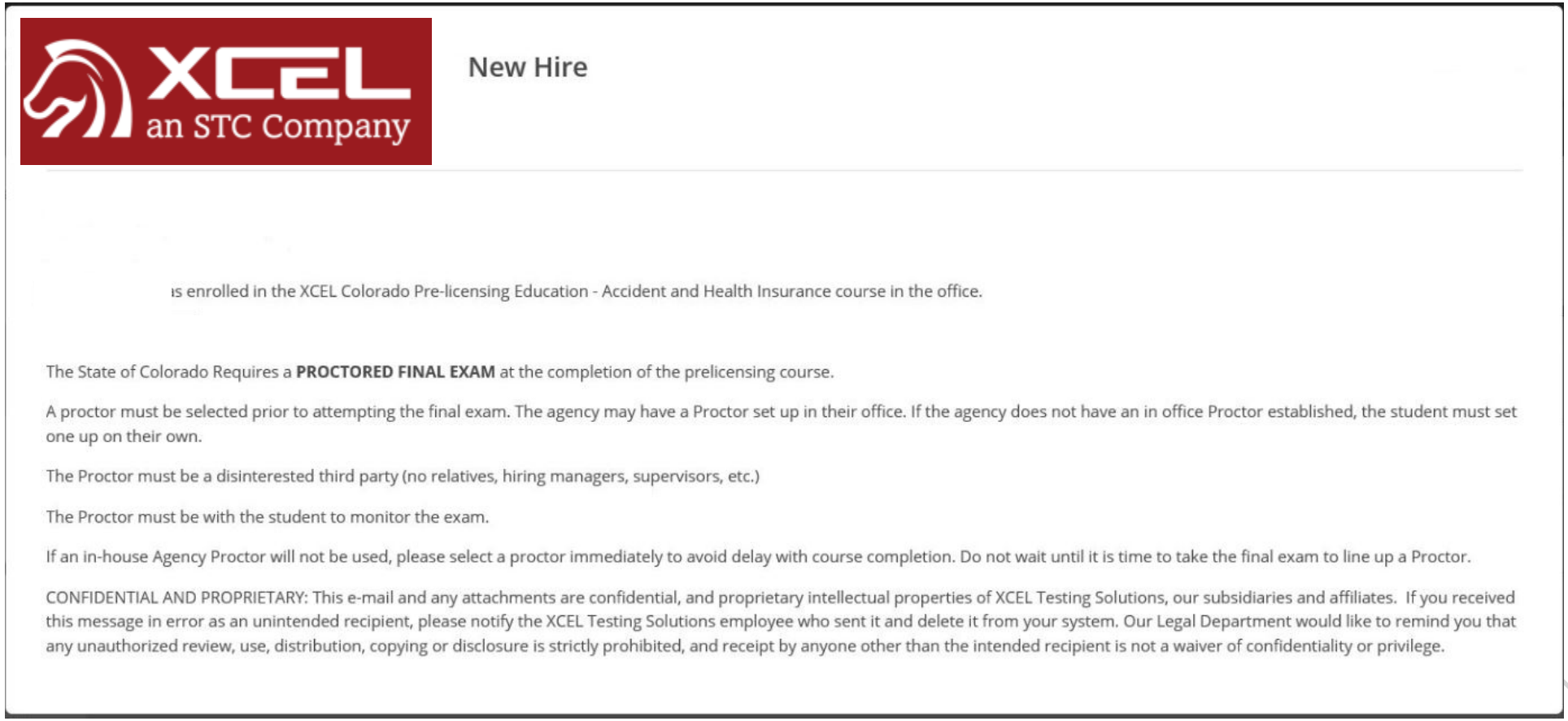
Partner Enrollment Email – Varies by State



New Hire

ıs enrolled in the XCEL Colorado Pre-licensing Education - Accident and Health Insurance course in the office.

The State of Colorado Requires a **PROCTORED FINAL EXAM** at the completion of the prelicensing course.

A proctor must be selected prior to attempting the final exam. The agency may have a Proctor set up in their office. If the agency does not have an in office Proctor established, the student must set one up on their own.

The Proctor must be a disinterested third party (no relatives, hiring managers, supervisors, etc.)

The Proctor must be with the student to monitor the exam.

If an in-house Agency Proctor will not be used, please select a proctor immediately to avoid delay with course completion. Do not wait until it is time to take the final exam to line up a Proctor.

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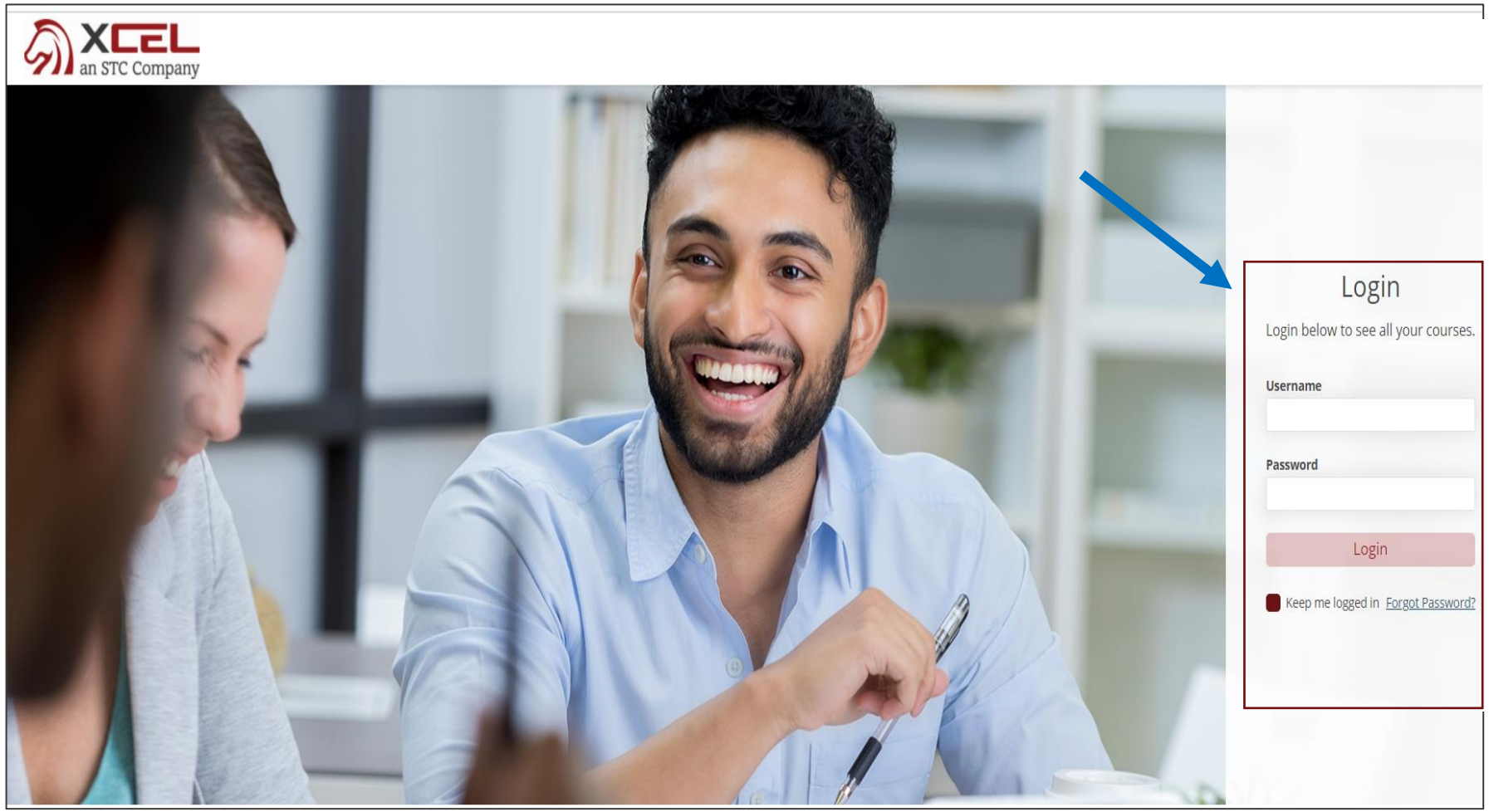
Candidate Log-In Screen



- Once Candidate has received their Enrollment email, they will be prompted to Log-In.
  - **Candidate Username and Password will be what was entered during the XCEL New Candidate Enrollment Process.**
- Candidates should bookmark the Log-In Page:
  - https://xcelsolutions.myabsorb.com/#/login

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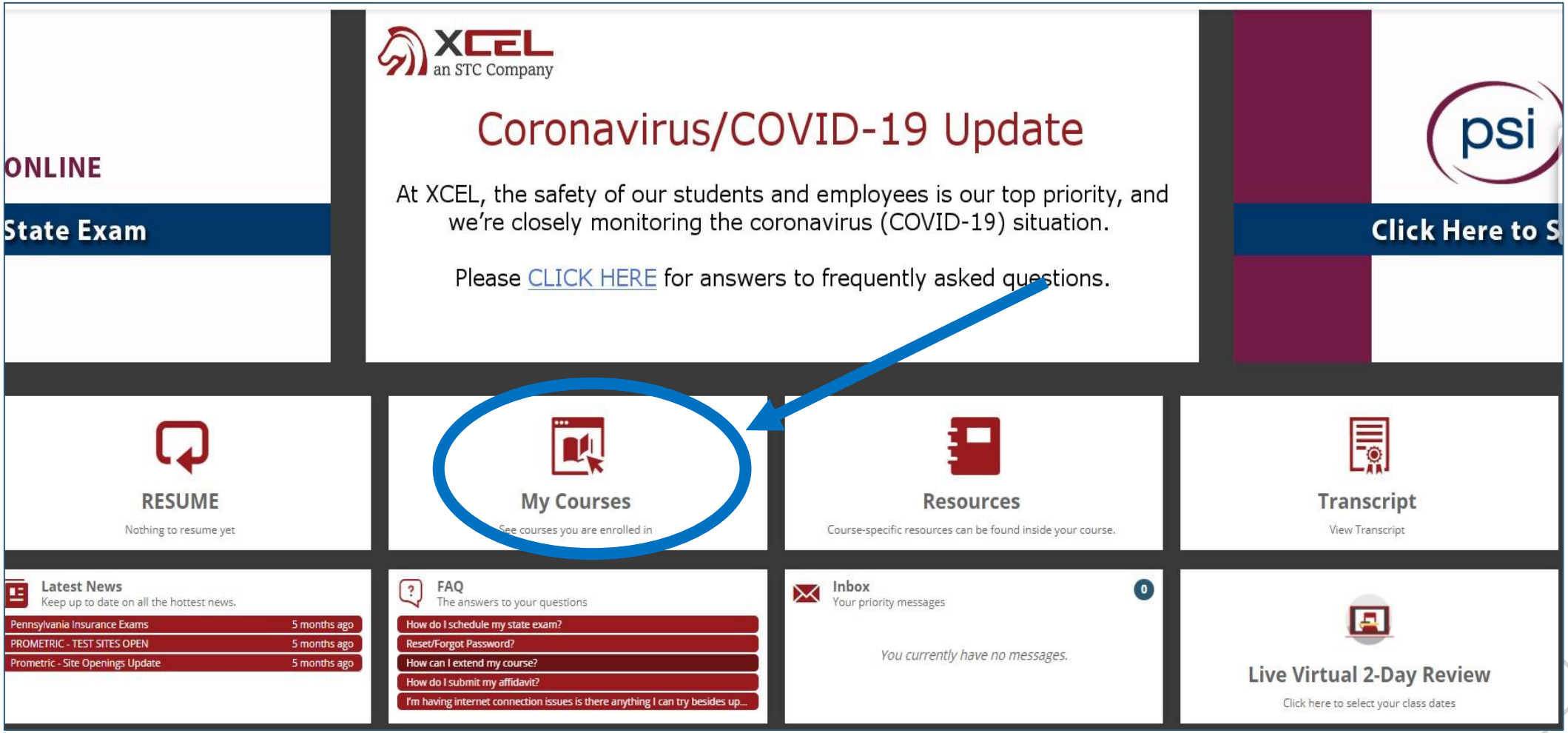
Candidate Dashboard



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Candidate Experience – XCEL Study Best Practices

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XCEL Candidate Experience – 3 Part Proven Best Practices

Get started - three part training

Before you start your training course, it's important to understand the steps necessary to pass the state examination on the **first attempt**. XCEL Solutions offers a unique three-step training program instructionally designed to **prepare people to pass** on the first attempt. There are three parts to the training: Pre-licensing Course, Prep Review Course, and Exam Simulator.

Part 1: Pre-licensing course

The Pre-Licensing Course will satisfy all state insurance pre-license requirements, allowing everyone to attempt the state insurance exam. Completing this section very quickly is critical (5 days or less). Upon completion, you gain access to the Prep Review Course (Part 2) and Exam Simulator (Part 3).

Part 2: Prep Review Course

This part of the training features content "boiled down to the essence" of the state exam. Chapters have only a few pages of material, but the content must be mastered to pass. Instructionally designed to teach individuals how to pass, most study effort should be invested here. Unnecessary information has been eliminated. Chapter exams are substantially larger (50+ questions), providing exposure to the types of questions seen on the state exam. **IMPORTANT: Most study effort (50% or greater) should be devoted exclusively to the Prep Review Course.**

Part 3: Exam Simulator

These special exams are designed to gauge content retention levels. Exams are comprised entirely of questions known or historically seen on state examinations. **IMPORTANT: Only take the Exam Simulators after the Prep Review Course has been successfully completed. It ensures these questions will be "fresh in the mind".**

*Some States require a minimum amount of study time. XCEL ensures you meet those times as you navigate through the Pre-licensing course.

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Candidate Experience
Part 1 – Pre-Licensing & Certification Exam

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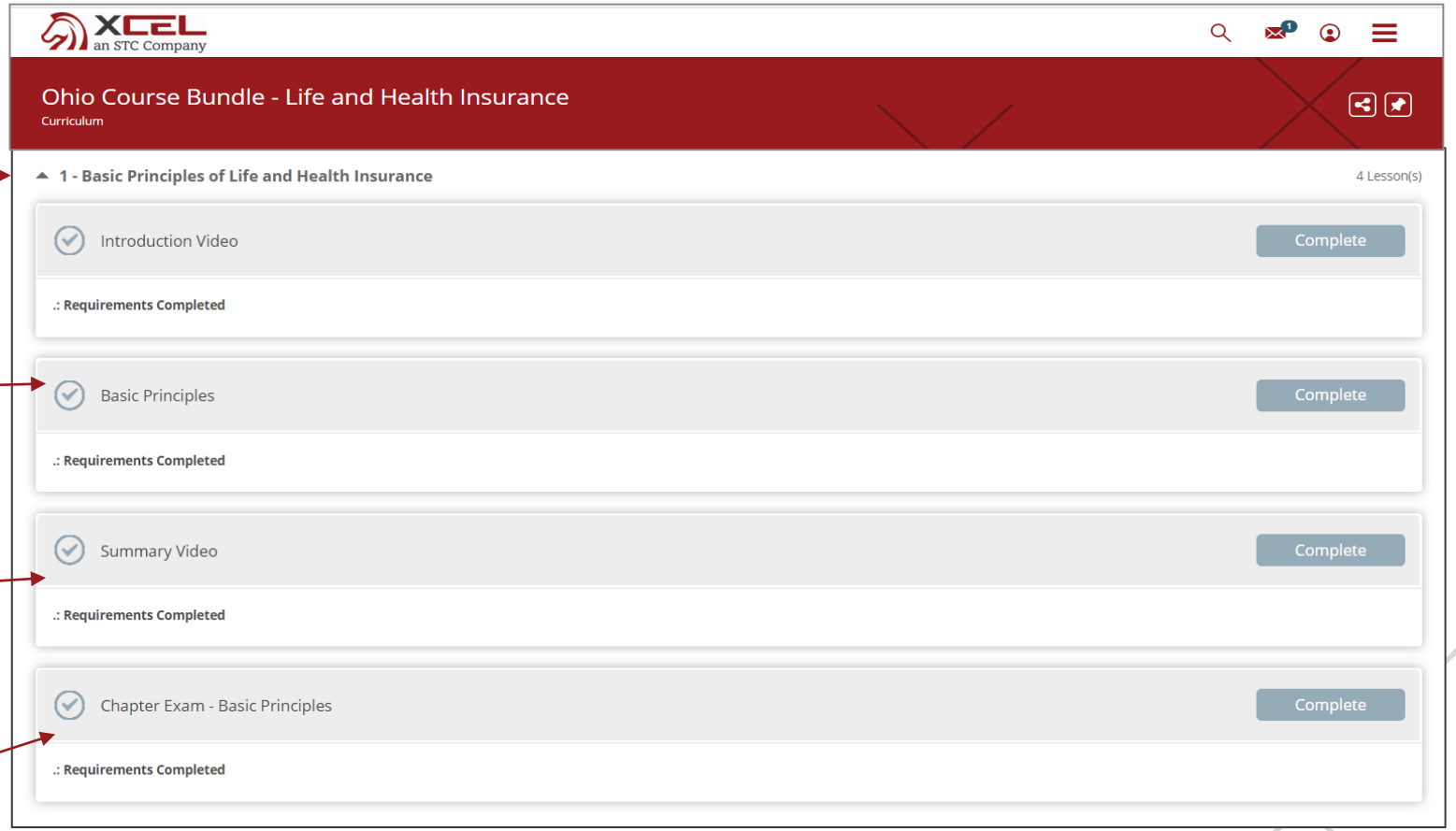
Part 1 -Pre-Licensing Course

Watch Intro Video

Read Chapter of Study Material

Watch Chapter Summary Video

Take Chapter Exam



Continue this process until all Chapters and Chapter Exams have been completed

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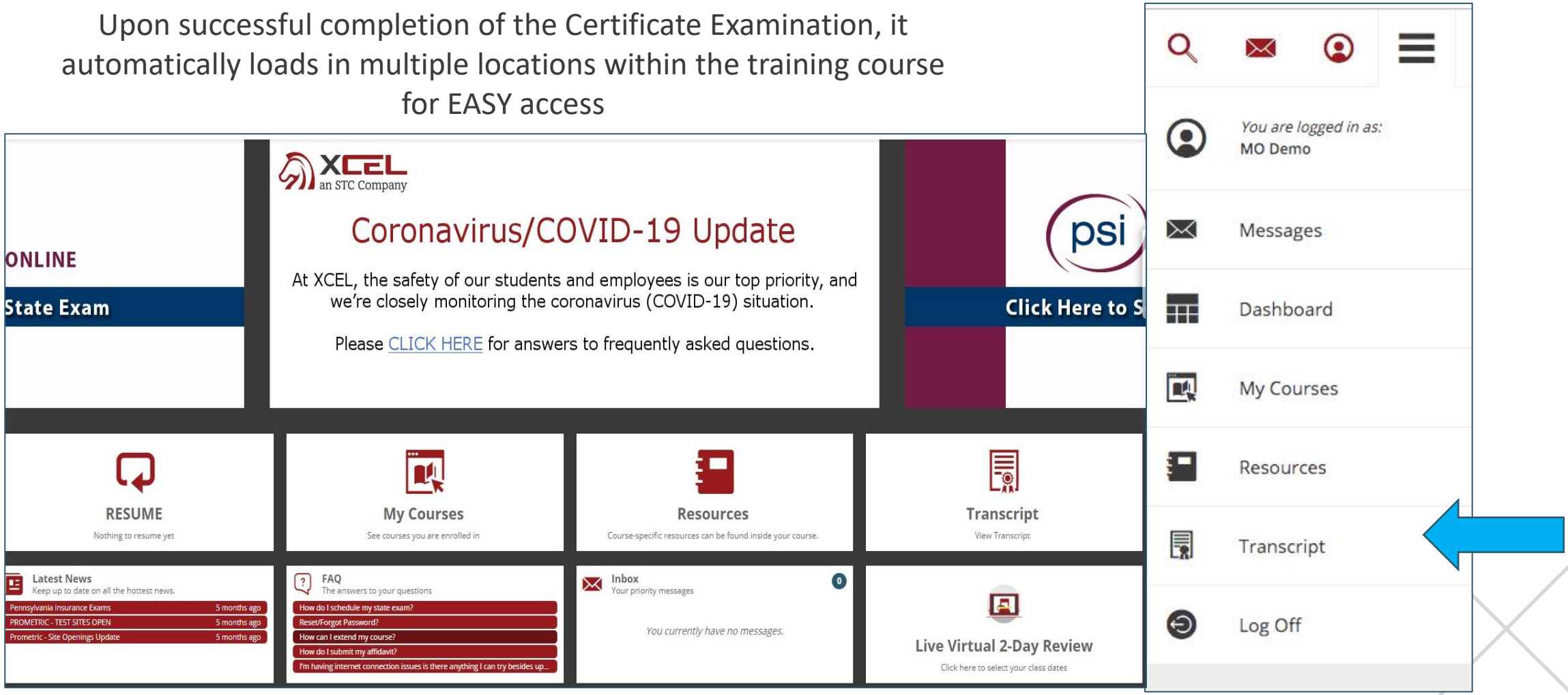
Part 1 - Certification Exam*

*If State Required

Upon successful completion of the Certificate Examination, it automatically loads in multiple locations within the training course for EASY access



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Candidate Experience
Part 2 – Prep Review Course

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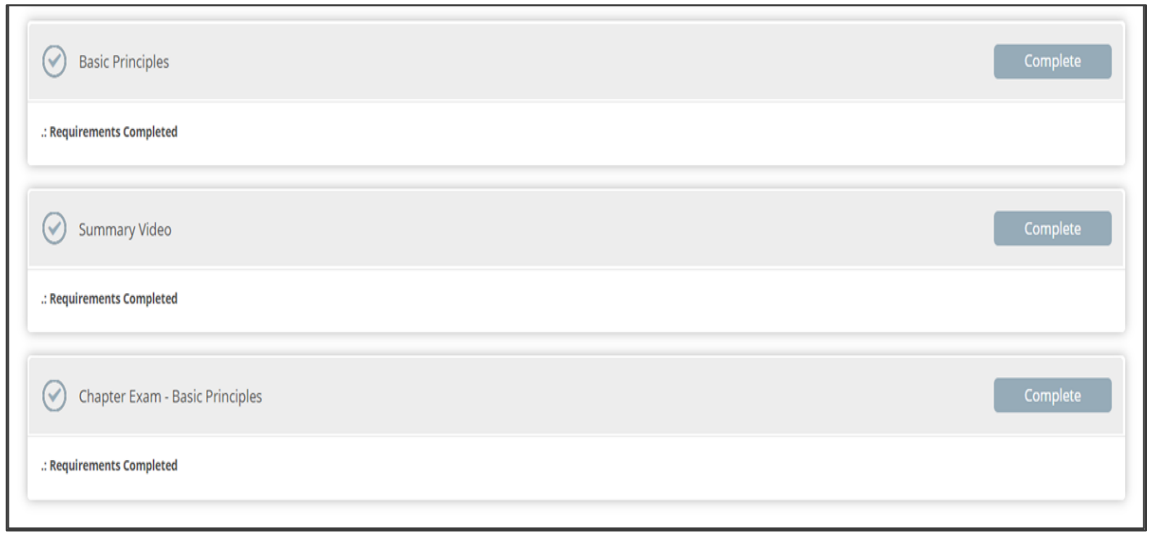
Part 2 - Prep Review Course

XCEL Candidate Homeroom – Prep Review Course Card



Chapter Exams with PREP REVIEW Course

- Chapter exams are substantially larger, testing the candidate's true level of retention
  - "Drill and Kill" approach on KNOWN exam questions
  - Explanations are provided immediately upon exam question completion
  - Chapter Exams can be taken multiple times, allowing students to truly master the materials
  - Reviews ALL Key Facts for State Exam

NOTE: Candidates can move freely between Chapters, focusing on areas where they need extra attention. The course doesn't require students to complete it in order.

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Candidate Experience
Part 3 – EXAM Simulator

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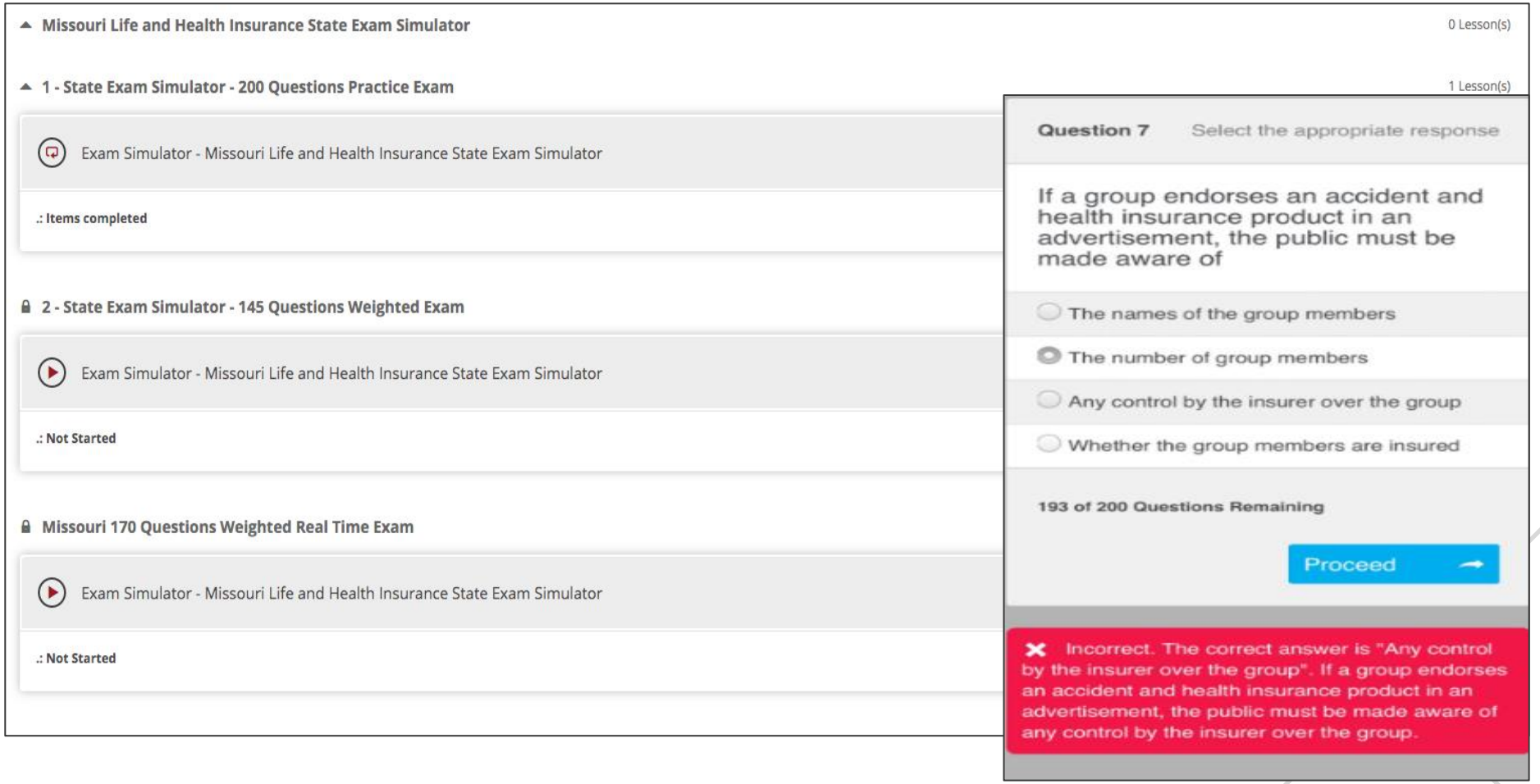
Part 3 - Exam Simulator

- Comprehensive Exams
- Each exam must be completed in order
- Requires students to obtain an 85% passing grade before advancing to next exam
- Third Simulator is Weighted and Timed, like the actual State Exams

Comprised of KNOWN or Historically Seen Exam Questions



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Candidate Experience Additional Candidate Resources

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Candidate Resources

Additional Candidate Resources Include:

- Downloadable & Printable State Licensing Handbook.
- Link to Schedule Your Exam
- Downloadable & Printable Cliff Notes

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Cliff Notes

- The Cliff Notes represent a detailed summary of the “must-know” facts and are broken down by Chapter
- This digital “cheat sheet” is perfect as a final review in the days leading up to the regulatory exam.

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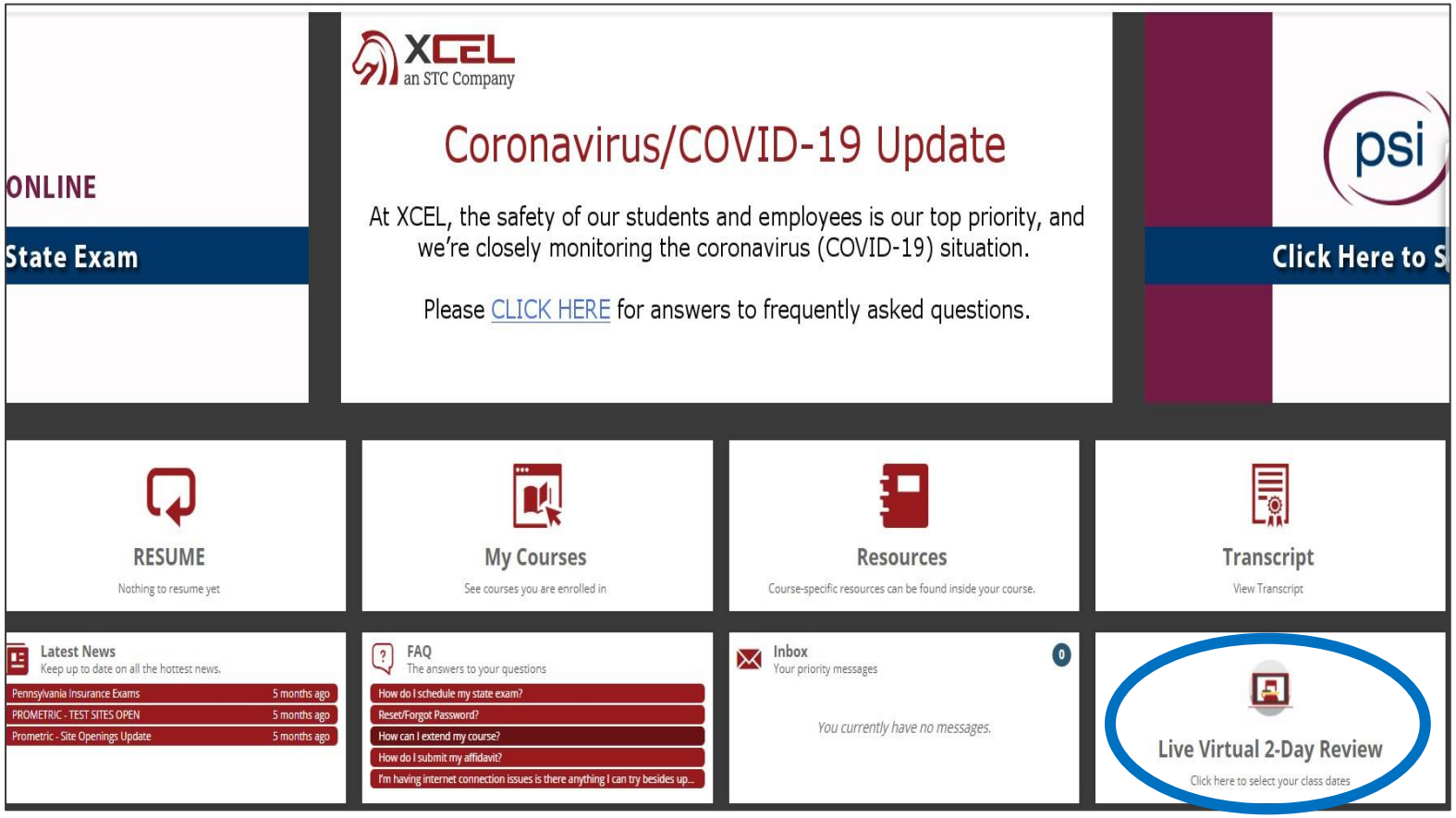
Live Virtual LAH Classes



- Candidates will have the ability to attend a Live Virtual 2-Day Class
- Candidates will select the Live Virtual 2-Day Review tile directly from their XCEL Candidate Dashboard

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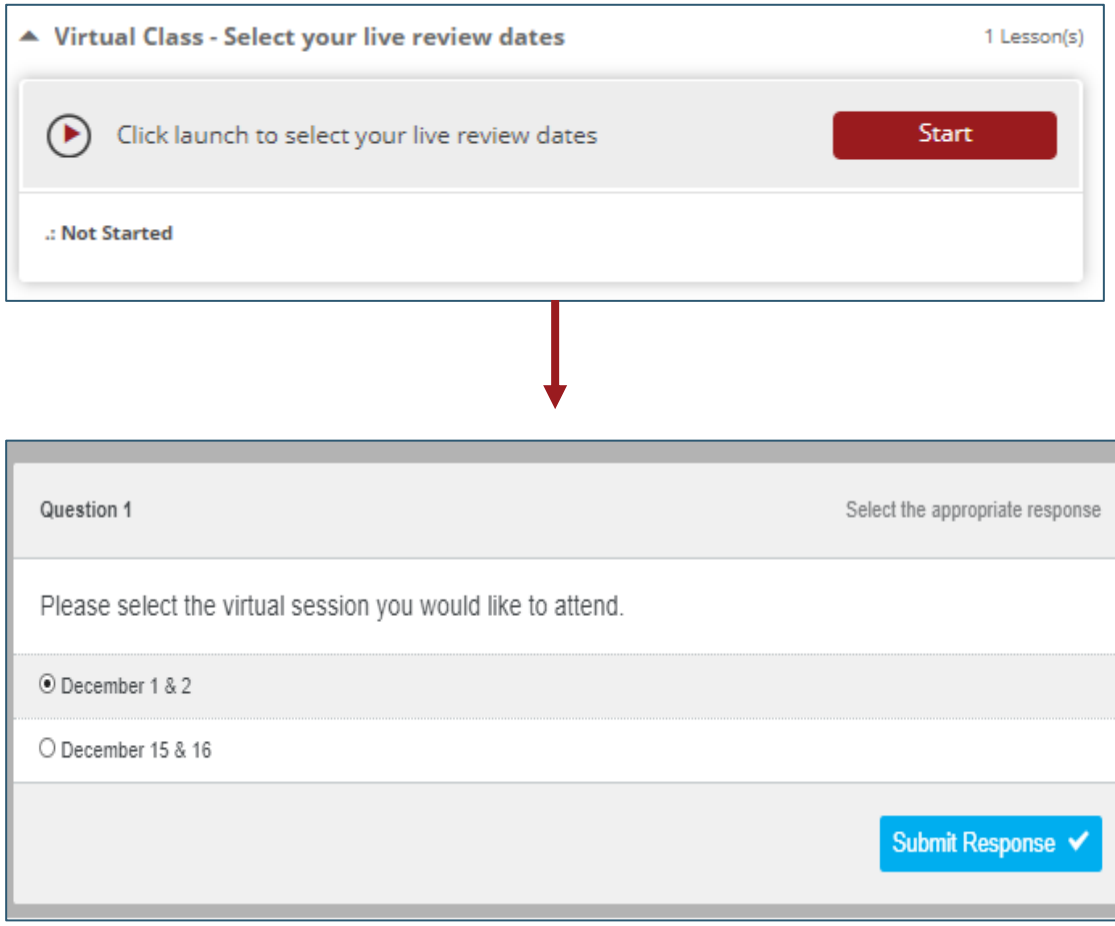
Virtual Class Enrollment Process



Step # 1 - Candidates will select "Start"

Step #2 – Candidates will Select the Virtual Session that works best for their Schedule and "Submit Response"

- Classes offered twice monthly

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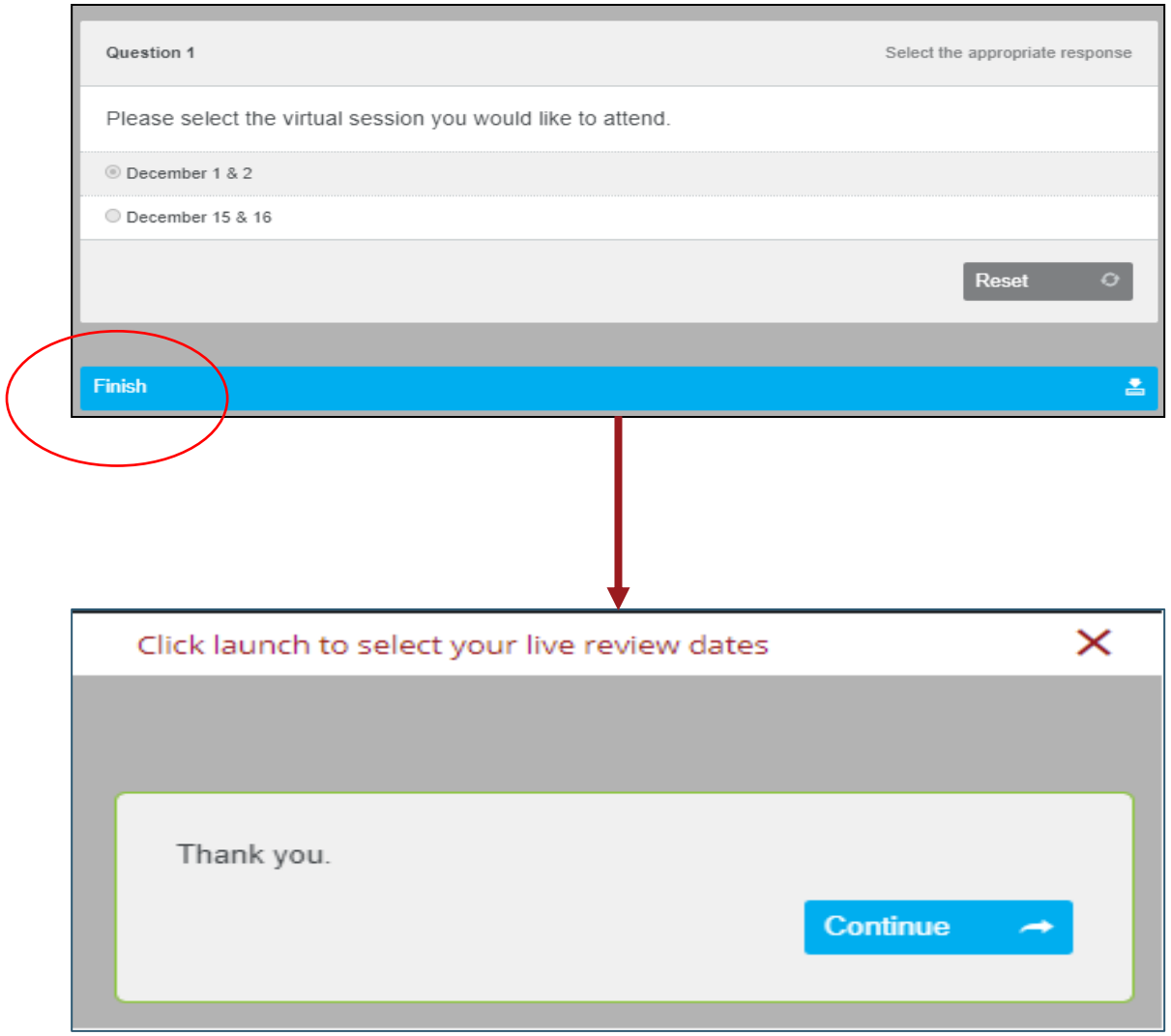
Virtual Class Enrollment Process



Step # 3 - Candidates will select "Finish"

Step #4 – Close the Submission Box to return to Candidate Dashboard

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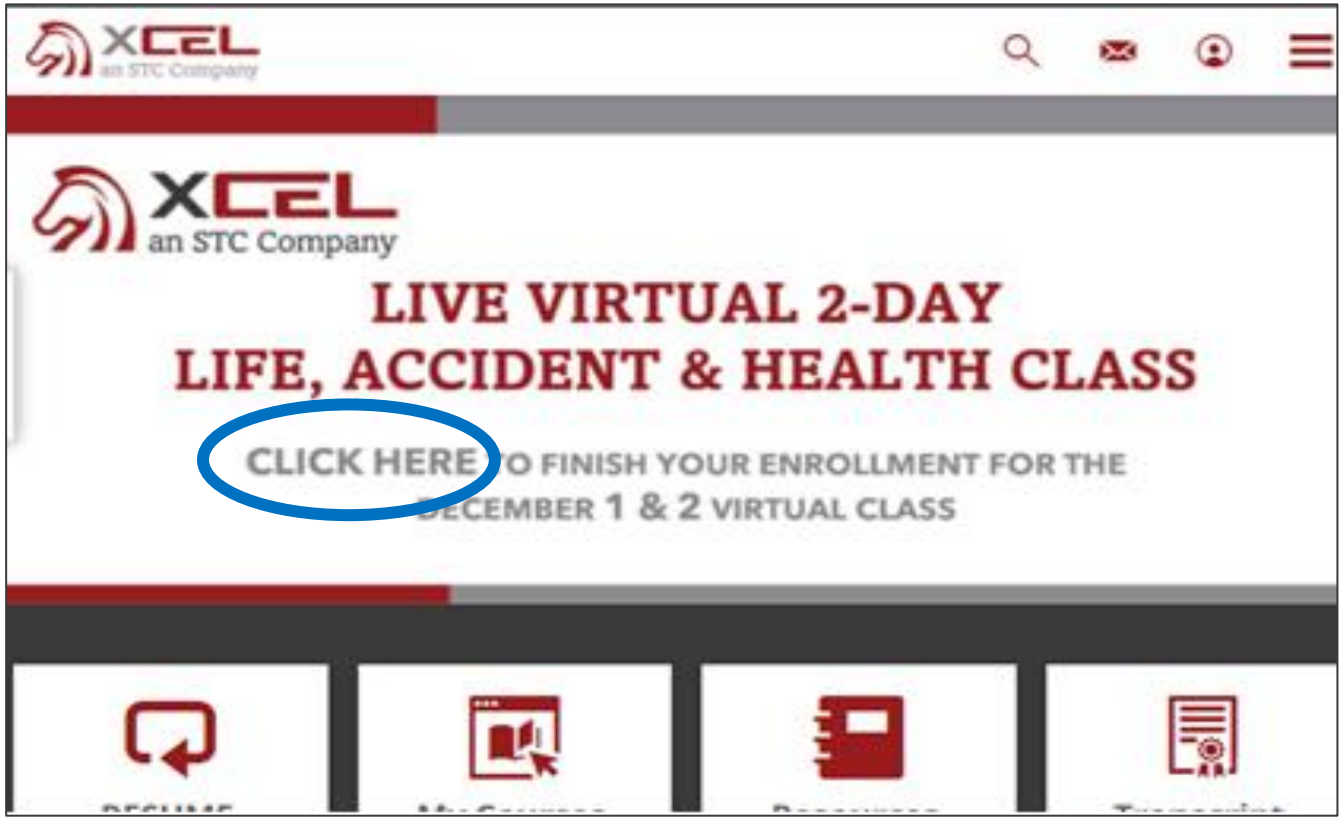
Virtual Class Enrollment Process



Step # 5 – From Candidate Dashboard, select “Click Here” to complete the Class Enrollment.

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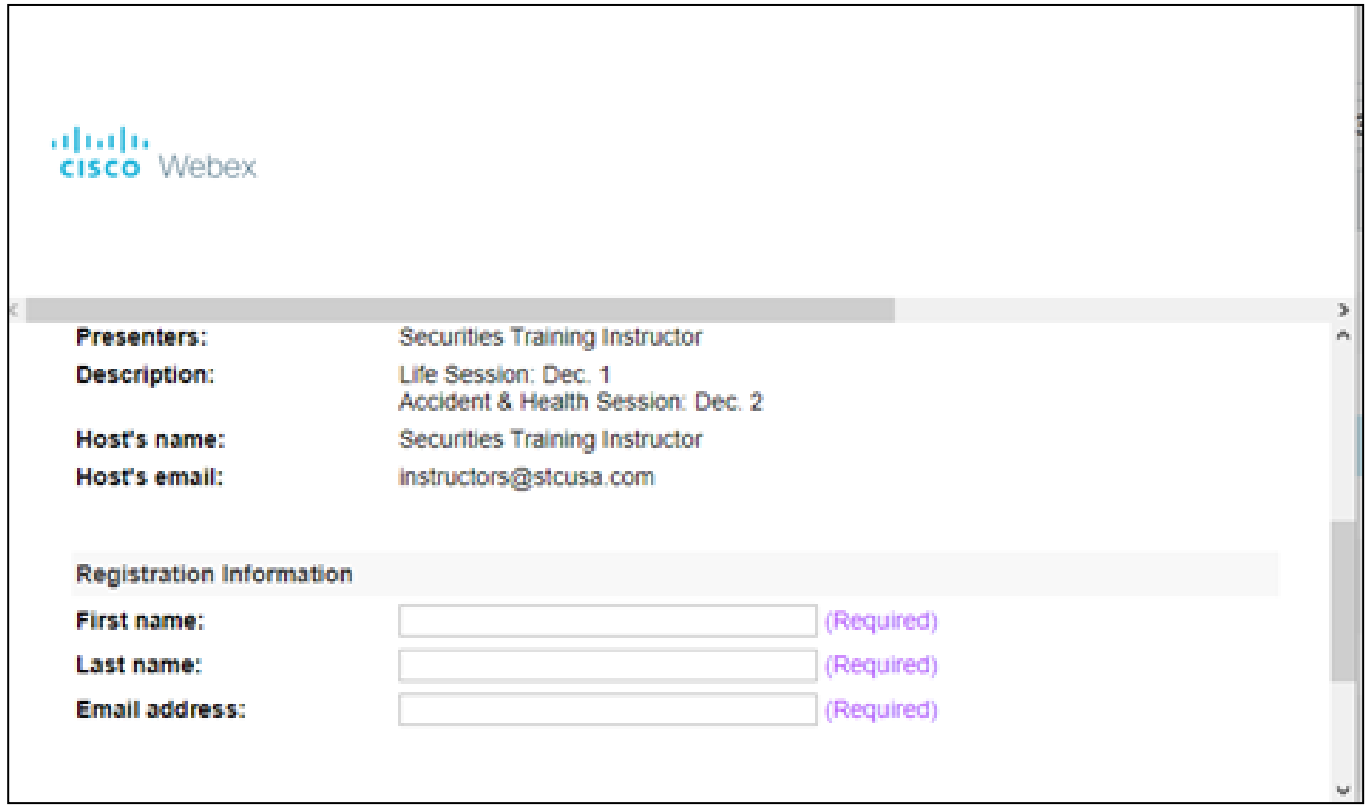
Virtual Class Enrollment Process



Step #6 – Complete the WebEx Registration Information.

Step #7 – Candidate will receive confirmation Email for the Review Class Selected 2 days before Class start date.

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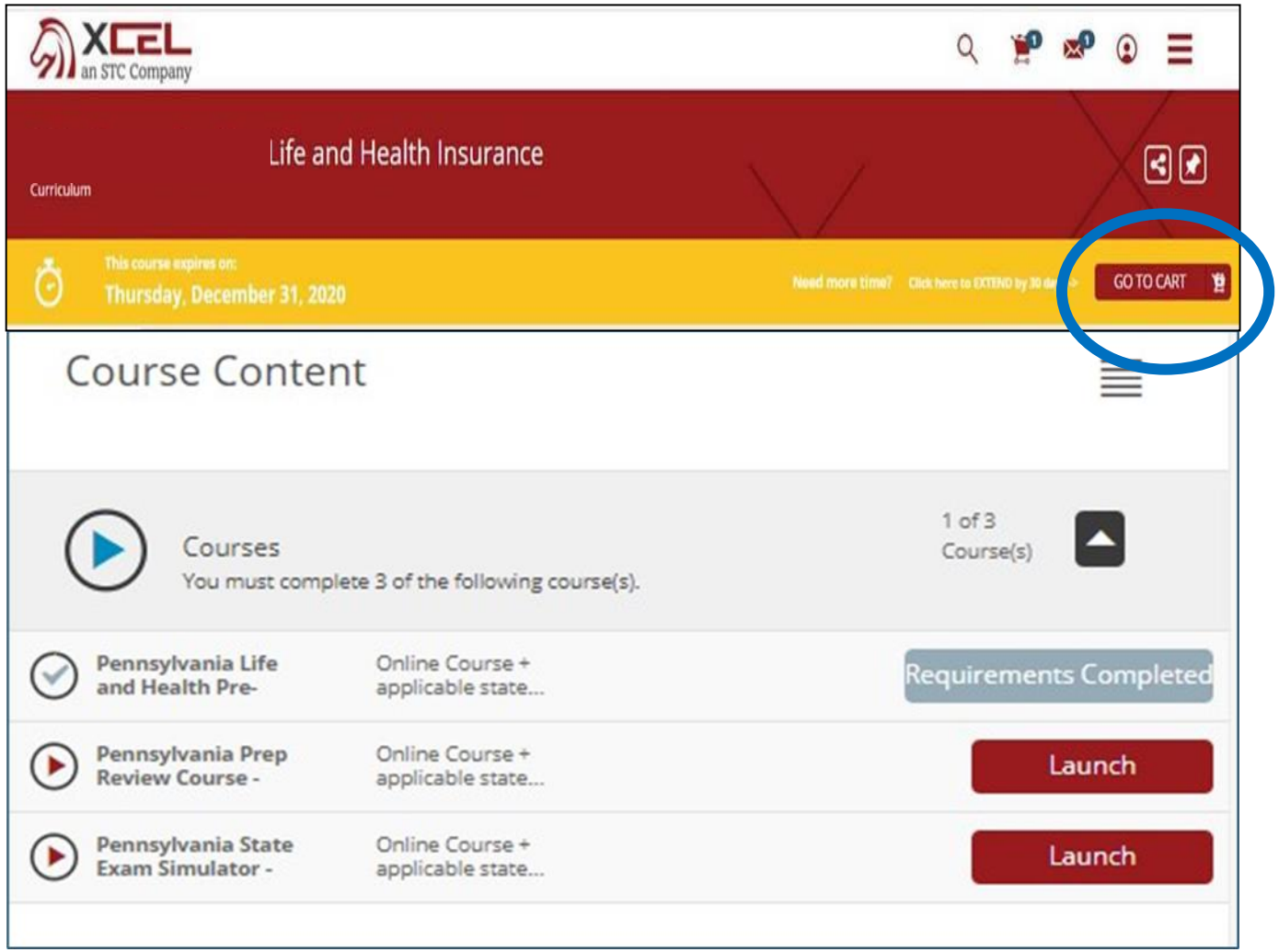
Candidate Extension Process



If Candidates need additional time with their XCEL materials:

1. Candidate will open the expired Course
2. Candidate will add the Additional Time to their Cart

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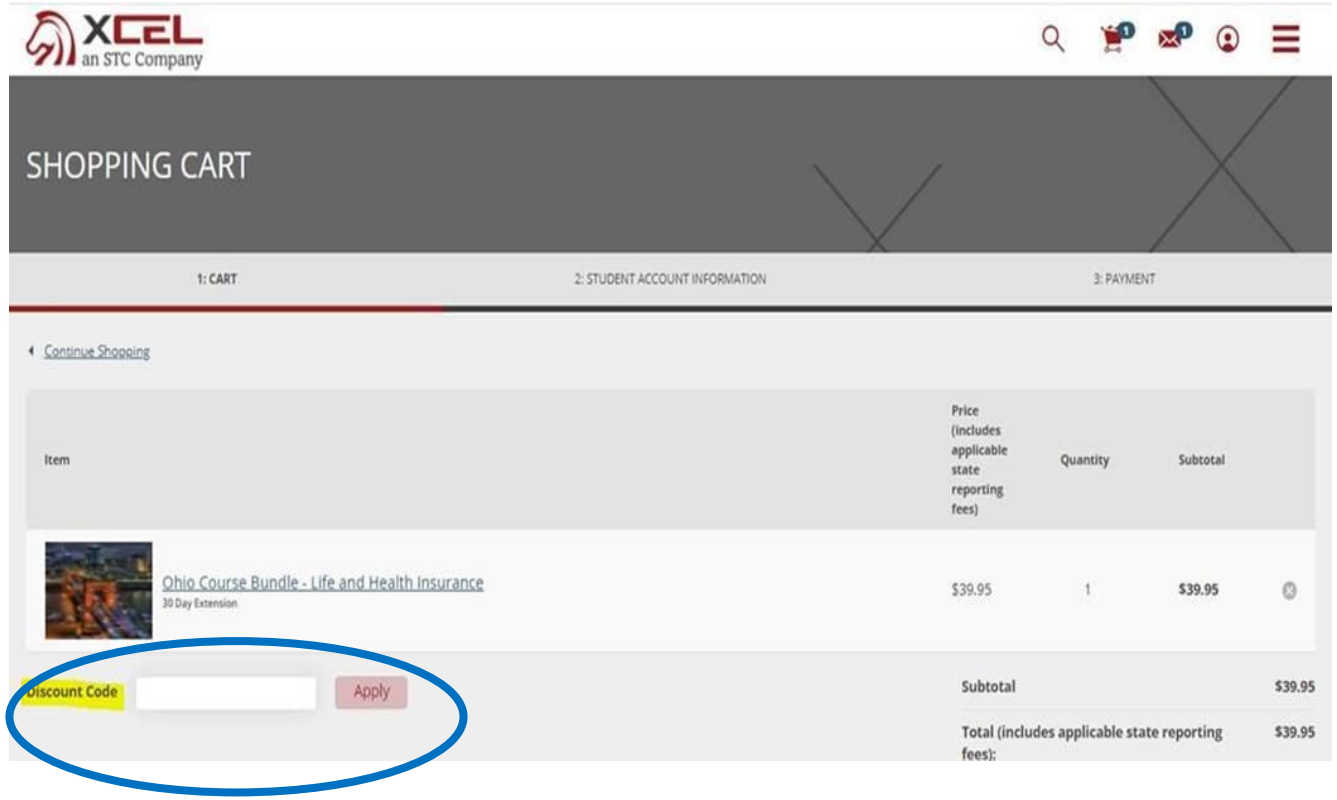
Candidate Extension Process



3. Candidate will enter the discount code **"NYLEXT30"**
4. The Price will drop to $0.
5. Candidate proceeds to Checkout.
6. 30 Additional days of access are added to Candidate's materials.

Extension Code can be used as many times as need

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Partner & General Office Reporting

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Partner & General Office Reports: Interpreting the Data

INTERPRETING THE DAILY PROGRESS REPORT

**The daily report will be automatically emailed to you every morning before 9:00 EST.*

To correlate with the 3 parts of our course, the daily report will show where each candidate falls in his studies (% of completion) with respect to each of the course's 3 parts:

- **Pre-Licensing Education** Course (part 1) = denoted on the daily report as **PLE**
- **Prep** Review Course (part 2) = denoted on the daily report as **Prep**
- State Exam **Sim**ulators (part 3) = denoted on the daily report as **Sim**

Our "Prepared to Pass" indicator assesses the candidate's level of "test readiness" based on his performance in the most heavily-weighted chapters as they relate to the state licensing exam:

NOT PREPARED – Less 100% of Prelicensing Education Course

GETTING CLOSER – 100% of the Prelicensing Education Course course completed

ALMOST THERE - 100% PREP REVIEW or 100% SIMULATORS or (67% SIMULATORS and 50% PREP REVIEW)

PREPARED TO PASS - (50% PREP REVIEW and 100% SIMULATORS) or (100% PREP REVIEW and 67% SIMULATORS)

Algorithm aside, you more or less want them in green or blue prior to testing. Yellow denotes that the student has met the state's education requirements and are eligible to take the state exam.

Pipeline Activity Summary

- Student Activity Summary from last 30 days
- Each Partner will have their own report showing only their students

Student Progress Summary

- Broken into 3 parts
  - Pre-licensing Education
  - Prep Review Course
  - State Exam Simulators
- Prepared to Pass reporting
- Time Spent in Course Visibility

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XCEL Daily Partner Report – Pipeline and Student Progress

Pre-Licensing: Life and Health (Disability)

Date Enrolled	Last Log In	Time Spent	% PLE Complete	PLE Date Completed	First Name	Last Name	Phone	Email	Course	Hiring Manager	% Prep Complete	% Sim Complete	Prepared to Pass
08/17/2020	08/17/2020	0 hrs 0mins	0%	-					New York Life and Health Pre-licensing		-	-	NOT PREPARED
08/12/2020	08/18/2020	14 hrs 10mins	36%	-					New York Life and Health Pre-licensing		-	-	NOT PREPARED
08/05/2020	08/09/2020	1 hrs 17mins	5%	-					New York Life and Health Pre-licensing		-	-	NOT PREPARED
07/29/2020	08/12/2020	36 hrs 23mins	100%	08/12/2020					New York Life and Health Pre-licensing		0%	33%	GETTING CLOSER
07/24/2020	07/31/2020	4 hrs 9mins	96%	-					New York Life and Health Pre-licensing		-	-	NOT PREPARED
									New York Life and Health Pre-licensing		0%	0%	GETTING CLOSER
									New York Life and Health Pre-licensing		100%	100%	PREPARED TO PASS

Student First Name, Last Name, Phone Number & Email Information

Pipeline Activity Summary

Department	Enrolled Last 30 Days	Enrolled Last 7 Days	Active Last 10 Days	Active Pipeline	% Completed
Partner Name	9	5	12	13	33%

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XCEL Daily General Office/Managing Partner Report – Pipeline and Student Progress

Pipeline Activity Summary

Department	Enrolled Last 30 Days	Enrolled Last 7 Days	Active Last 10 Days	Active Pipeline	% Completed
Partner Name	2	0	1	3	100%
Partner Name	1	0	1	1	0%
Partner Name	1	0	3	3	33%
Partner Name	1	1	1	1	0%
Partner Name	3	0	3	4	67%
Partner Name	9	2	6	11	33%
Partner Name	0	0	1	1	0%
Partner Name	2	0	2	2	50%
Partner Name	2	0	4	4	25%
Total	21	3	22	30	36%

Hiring Manager	% Prep Complete	% Sim Complete	Prepared to Pass
	-	-	NOT PREPARED
	-	-	NOT PREPARED
	-	-	NOT PREPARED
	0%	33%	GETTING CLOSER
	-	-	NOT PREPARED
	0%	0%	GETTING CLOSER

							Pre-licensing		
06/16/2020	08/02/2020	10 hrs 5mins	100%	07/27/2020	Agent Name	New York Life and Health Pre-licensing		100%	100%	PREPARED TO PASS

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Next Steps:

12/01 - XCEL Enrollment Flyers Distributed

12/01 - STC/XCEL Resource Center Live

12/07 - Enrollment Site and Discount Code Live

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Candidate Support Contacts

Callie Salvisburg Castles
Customer Success Manager
212-485-2376
Callie.castles@colibrigroup.com

LAH Technical Support

support@xcelsolutions.com

904-999-4923

LAH & Securities Instructor Support Email:

instructors@stcusa.com

Instructor Hotline:

Monday - Friday 9:00am – 5:00pm EST

800 782-3926

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