CareBetter

ENDURING PROTECTION

Florida · Individual & Family
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AGENT ONBOARDING

Quick Start Sales Guide

What to do once your carrier appointments are complete.

01

Log in

Use the magic link we send to your phone or email. There is no password to set up or remember.

02

Fund your wallet

Add funds to your wallet so you can buy leads. Leads are purchased straight from your wallet balance.

03

Review the training

Training documents, call scripts, and videos are all in the portal. Go through them before your first call.

04

Start selling

Click **Start Selling** in the phone dropdown at the top of the page.

An interested prospect will be transferred to your headset, usually within 30 to 60 seconds.

05

Sell and enroll

Work the call using the call script, then complete the enrollment inside HealthSherpa.

If the Marketplace asks for documents, the client has 30 days to upload them.

06

Get paid

Commissions are paid monthly — per member, per month — for as long as the policy stays active.

> **That's the whole process.** Every policy you write keeps paying each month it stays on the books. Questions at any stage — email agents@carebetterinsurance.com.

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