



# Everise Licensing Portal Guide

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# Welcome to the Everise Licensing Portal

1. Click the link in the email to access the Everise Licensing Portal.
2. Change your password to log in. Follow the guidelines indicated in creating a password.
3. Include at least:
  - 8 characters
  - 1 letter
  - 1 number
4. Prepare the following: (Please see page 16 for guidelines and requirements.)
  - Fingerprint Questionnaire
  - Driver's License or State ID Card
  - Social Security Card
  - Valid proof of eligibility to work in the US— for non-US citizens only



## Reminders

- **Accurately** input information into the **Producer Detail Record** section of the Everise Licensing Portal website.
- The information entered will be used to renew and apply for your licenses.
- The Licensing Department will be updating the **business email, business phone number** and **business fax number** in NIPR to reflect Everise information since we will be the authorized submitter to apply for and maintain your licenses.

# Biographic Information

## Biographic Information



### Biographic Information for

- SSN
- Gender
- Citizenship Country
- Agent Type

**Social Security Number (SSN)** – Enter your SSN without dashes. The dashes will auto-populate.

**Gender** – Select which applies.

**Citizenship Country** – Select which applies.

**Agent Type** – This is automatically selected as Producer.

# Employment History



## Employment History for

NIPR requires **five consecutive years** of employee history. Enter history **oldest to most recent**.

Employment history can contain time in school, vocational training, or military services as applicable.

-  For periods of unemployment, note *Employer = "Unemployed", Position = "Not Applicable"*.
- For periods of dual employment, note only one employer for the given time period.

Start Dates must be less than or equal (today's date). End Dates must be less than or equal (yesterday's date) or blank for the most recent entry.

*NIPR limits the number of characters for Employer (100), Position (25), and City (35). If the limit is hit, either abbreviate the entry or leave truncated.*

*Employer Name	*Position	*Start Date	End Date	*City
Everise/C3	Licensing Coordinator	Apr 1, 2012 	<input type="text"/> 	Tahlequah

## Reminders

- The portal requires **5 consecutive years** of work history including self-employment, full/part time work, military service, unemployment, and full-time education.
- It will not allow you to proceed to the next section if there are gaps greater than **one month** in the 5-year timeline.
- Start from your oldest to most recent employer.

## Review Checklist

- I have included the city and state for each entry.
- I have used the city and state where I lived for the entries when I worked from home or was unemployed.
- I have included a position for each entry.

# Address Information

## Residence Information

The screenshot shows a form titled "Address Information for" with a red envelope icon. Below the title is the section "Email and Website Information". It contains three input fields: "Personal Email" (empty), "Business Email" (containing "everise.licensing@weareeverise.com" highlighted in yellow), and "Business Website URL" (empty). Above the form is a green progress bar with two checkmarks.

**Personal email** – Input your personal email.

**Business Email** – Input **everise.licensing@weareeverise.com**

**Business Website URL**– Leave blank.

The screenshot shows a form titled "Residence Information". It contains three input fields: "Residence Address 1" (empty), "Residence Address 2" (empty), and "Residence Address 3" (empty).

**Residence Address 1** – Enter the street address.

**Residence Address 2** – Enter apartment, suite, unit, building, floor etc.

**Residence Address 3** – Leave blank.

\* Residence City

\* Residence State

\* Residence County

\* Residence Zip

\* Residence Country  
U.S.A.

\* Residence Phone

**Residence City** – Input city.

**Residence State** – Select from the dropdown.

**Residence County** – Select from the dropdown (if available).

**Residence ZIP Code** – Enter ZIP Code.

**Residence Country** – This will be defaulted to USA.

**Residence Phone** – Enter without dashes.

## Mailing Information

### Mailing Information

Mailing Same As Residence Information

If Mailing Information is the same as Residence Information, tick the **Mailing Same As Residence Information box**.

If mailing information is different from the residence information, input as listed below.

The screenshot shows a form titled "Mailing Information" with a sub-section "Mailing Same As Residence Information" which is checked. Below this are several input fields:

- \* Mailing Address 1: A text input field with a cursor.
- Mailing Address 2: A text input field.
- Mailing Address 3: A text input field.
- \* Mailing City: A text input field.
- \* Mailing State: A dropdown menu.
- \* Mailing County: A text input field.
- \* Mailing Zip: A text input field.
- \* Mailing Country: A text input field.

**Mailing Address 1** – Enter the street address.

**Mailing Address 2** – Enter apartment, suite, unit, building, floor etc.

**Mailing Address 3** – Leave blank.

**Mailing City** – Input city.

**Mailing State** – Select from the dropdown.

**Mailing County** – Select from the dropdown (if available).

**Mailing ZIP Code** – Enter ZIP Code.

**Mailing Country** – This will be defaulted to USA.

## Business Information

### Business Information

Business Same As

- Residence Information  
 Mailing Information

Business Information is required to be the same as Residence Information, except for the **business phone number & fax number**.

Enter your residence information for each line or tick the **Business Same As Residence Information radio button**.

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\* Business Phone

\* Business Fax

**Business Phone** – Enter **2087323776** without dashes.

**Business Fax** – Enter **2087323776** without dashes.



### Review Checklist

- I have updated the business email to [everise.licensing@weareeverise.com](mailto:everise.licensing@weareeverise.com).
- I have updated the business phone number to **2087323776**.
- I have updated the business fax number to **2087323776**.

# Background Information



## Background Questions for

The Applicant must read the following very carefully and answer every question. All written statements submitted by the Applicant must  
If applicant responds "yes" to one of the background questions please submit supporting documents electronically via [NIPR's Attachmen](#)

### ∨ Required

It is crucial to **disclose all background** including expunged, dismissed, or those that happened 30 or 40 years ago.

This process involves an **FBI background check**. Answering *no* when it should have been *yes* will complicate the process and could cause the license to be **delayed** or **denied**. The departments of insurance have been assessing fines and penalties for incorrect answers.

If you have any background, please provide:

1. A **hand signed** and **dated** typed statement, stating the facts of what occurred and how it concluded.
2. Supporting court documents, (some states may require **certified copies** with the court/county clerk stamp & signature):
  - charging document
  - court documents which detail the conviction/sentencing
  - final judgment
  - resolution of charges
  - probation/community service requirements & completion (if applicable)
  - receipt for any fines paid

Many states will not accept summaries from the county website, a search engine, or any other form.

If you need any assistance with the background questions, send an email to

[licensingdept@weareeverise.com](mailto:licensingdept@weareeverise.com).

8\* (Non-Resident License) In response to a "yes" answer to one or more of the Background Questions for this a

8A\* (Non-Resident License) Will you be associating (linking) previously filed documents from the NAIC/NIPR At

Note: If you have previously submitted documents to the Attachments Warehouse that are intended to be fi  
supporting document(s) to this application based upon the particular background question number you hav  
end of the application process, providing a link to the Attachment Warehouse instructions.

If you answer **yes** to any of the background questions, you will see Question 8 which needs to be answered yes.

You will then get Question 8A which you will need to answer **no**.

## State-Specific Questions

**ALL** state questions that require a *yes* or *no* answer must be answered, including the states that fall under **optional**.

### Alabama

AL

QUESTION

1\* Are you a US Citizen?

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1a\* Are you lawfully present in the United States and eligible to receive state or local public benefits?

Alabama wants to know if you are a US Citizen.

If you are not, the additional question 1a will populate for you to answer.

### California

CA

QUESTION

1\* For the purposes of the California application, you have been "convicted" if you were ever found guilty by a court of law. You must disclose all convictions, even if the charges were later dismissed or expunged, your guilty plea was withdrawn, your sentence was suspended, or you were just ordered to pay a fine. You must also disclose all driving related misdemeanors, including driving with a suspended or revoked license. If you fail to disclose all convictions, your application will be denied.

Have you disclosed all information required by California?

3\* (Non-Resident License) \* IMPORTANT: AS A CALIFORNIA LICENSE APPLICANT, YOU MUST ANSWER THIS QUESTION. NOTE THAT QUESTION #1A ON THE BACKGROUND QUESTIONS PAGE THAT FOLLOWS IN THIS APPLICATION WILL NEED TO BE ANSWERED ACCORDINGLY.

Please read the following definition of crime. California Applicant: "Crime" includes a felony, a misdemeanor, a verdict of a judge or jury, having entered a plea of nolo contendere, no contest, having had any charge expunged, given probation, a suspended sentence or a fine. You may exclude traffic citations and juvenile offenses triable as misdemeanors including driving offenses such as, but not limited to reckless driving, driving under the influence, or whether or not you believe the conviction has been removed from your record.

1 – Answer **yes**. It is just **an acknowledgement that you understand** that you do need to disclose everything. This is not asking if you have background.

3 – Answer this question based on your personal background. This includes driving offenses such as a DUI, reckless driving, driving with a suspended license, **whether or not** you spent any time in jail, and **whether or not** you believe the conviction has been removed from your record.

7\* DISCLOSURE AGREEMENT:

I consent to the publication, on the public Department of Insurance licensee directories, of any business telephone number, residential, or cellular telephone numbers used for business purposes. This consent is valid for the term of my license and California Insurance Code Section 1743.

NOTE: Pursuant to California Civil Code Section 1798.61, the Department publishes the names and business addresses of licensees. Select 'Yes' to Accept or 'No' to Deny.

7 – **Accept** or **deny** according to your preference. It is a disclosure agreement, consenting to have your phone number published in their directory.

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8 To assist the Department with reporting and outreach efforts, licensees are asked to voluntarily provide their race and ethnicity. Please select the following Race/Ethnicity that applies:

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9 Do you publicly identify as LGBT+ (Lesbian, Gay, Bisexual, and/or Transgender)?

---

10 Are you a veteran?

---

11 Are you a disabled veteran?

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8-11 – **Optional questions.** It is not necessary to answer these. Leave them blank or answer them as you see fit.

## Georgia

### GA

#### QUESTION

- 
- 1\* (New License) Have you been convicted of or are you currently charged with the commission of any crime or plea or had adjudication of guilt withheld in a criminal proceeding, other than a minor traffic offense?
- 
- 3\* I understand that I am required to complete and submit the Georgia Citizenship Affidavit and provide a copy of understand that I must use required form GID276-EN, a copy of which is available on the Georgia OCI website. copy ready to attach to this application or upload into the NIPR Warehouse immediately upon submission of th
- 
- 4\* (Renewal) Have you been convicted of or are you currently charged with the commission of any crime or plea had adjudication of guilt withheld in a criminal proceeding, other than a minor traffic offense, which has not been
- 

1 – Answer should match how you answered questions 1a, 1b, and/or 1c under the general background questions.

3 – Answer yes, the Georgia State Department of Insurance requires their Citizenship Affidavit be provided with the application. Georgia will send out a deficiency letter for every application. This notice can be disregarded.

4 – If you:

- **never held a Georgia License** - answer no
- **have held a Georgia License** - this question is asking if you have any new background other than a minor traffic offense that is needing to be reported.

## Minnesota

### MN

#### QUESTION

- 1\* Have you read the Tennessee Warning?

Tennessee Warning may be found by visiting [https://pdb.nipr.com/html/SSR/Minnesota\\_ERL.htm](https://pdb.nipr.com/html/SSR/Minnesota_ERL.htm)

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1 – A **yes** answer is required to move forward in the portal. Click the link to read the Tennessee Warning that is provided.

## Missouri

MO

### QUESTION

1\* I was a non-resident of Missouri for the last (3) calendar year:

Yes: I was a Missouri non-resident the last three calendar yea

No: I was a Missouri non-resident the last three calendar yea

1 – Missouri asks if you have been a non-resident for the last 3 calendar years and if you have had income paid to you from their state.

- Answer **yes** if you did **NOT** have Missouri income.
- Answer **no** if you traveled to Missouri for work from another state, making you a non-resident, then you would have non-resident income.

## New York

NY

### QUESTION

2\* Applicants applying for a license they previously held will be asked the following question. If you have never held a NY license, answer No.

Since expiration of your last authority, have you transacted business in New York under the license you are applying for in this application?

3 Licensees of New York's Department of Financial Services ("DFS") are required to comply with DFS's Cybersecurity Regulation (23 NYCRR Part 500) cybersecurity program to protect nonpublic information and the filing of a certification with DFS confirming compliance with that regulation. A copy about complying with DFS's Cybersecurity Regulation can be found on the DFS Website at: [https://dfs.ny.gov/industry\\_guidance/cybersecurity](https://dfs.ny.gov/industry_guidance/cybersecurity) Have you complied with New York's Department of Financial Services Cybersecurity Regulation (23 NYCRR Part 500)?

2 – This question is asking if you have ever transacted business in New York with an expired Producer License. (If you have never held a New York license, you will answer no.)

3 – Answer **yes**. Everise provides mandatory training that meets the Cybersecurity requirements.

## Texas

TX

### QUESTION

5 \* Have you read TX State Specific Requirements?

Individual Non-resident: <https://npr.com/licensing-center/state-requirements/texas-non-resident>  
Individual Resident: <https://npr.com/licensing-center/state-requirements/texas-resident>

1 – A **yes** answer is required to move forward in the portal. Click the appropriate link to read the Texas State Specific Requirements that are provided.

## Massachusetts

MA

### QUESTION

2 Are you legally blind?

2 – Read and answer accordingly.



### Review Checklist

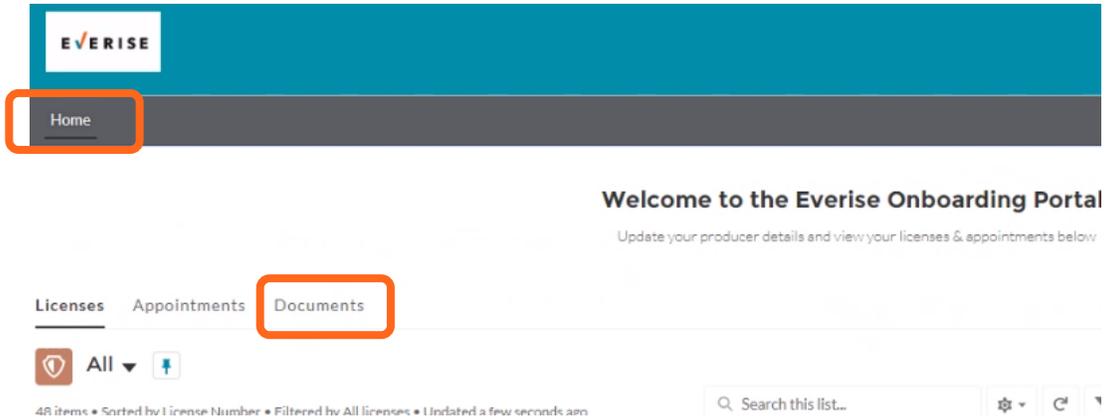
I have read and understand the following questions:

- CA1 has been answered **yes** because I am acknowledging that I understand what CA requires to be disclosed. This question is not asking if I have background.
- CA3 has been answered **yes** if I answered yes to general background questions 1A, 1B, or 1C and/or if I have any traffic offenses.
- GA1 has been answered **yes** if I answered yes to general background questions 1A, 1B, or 1C (I do not need to disclose traffic offenses to GA).
- MO – If I did not have Missouri non-resident income in the last 3 years, I will answer **yes**. I will answer **no** if I did not live in Missouri but traveled into Missouri for work.
- NY1 is asking if I transacted business in NY with an **expired** license.
- NY3 must be answered **yes**, acknowledging that I will comply with cybersecurity if needed. (This requirement is covered by the cybersecurity CBT that will be completed in the Everise mandatory training.)



# Uploading Documents

## Where to Go



This is what the Everise Onboarding Portal looks like once you have gone back to the home screen.

Click the **Documents tab** to start uploading. **IMPORTANT:** If you see a duplicate upload, **DO NOT** delete. **If you delete the duplicate, it will delete all copies from the portal.**

## Guidelines

### Fingerprint Questionnaire

- Save the attached Fingerprint Questionnaire to your computer before answering or it will come back to us blank.
- Complete the required information. Your name must be entered on the fingerprint questionnaire **as it appears on your driver's license** or ID.
- **Save** again after filling out.

### Driver's License or State ID Card

- Provide a clear, easy-to-read **color** photo or scanned copy—both **front and back** of the ID. (Make sure all 4 corners can be seen.)
- It must be **current**, not expired, and with current name.
- **NOTE: Are you having a legal name change or about to?** Let us know by sending an email as the name on your producer licenses must match your legal name before production.

## Social Security Card

- Provide a clear, easy-to-read photo or scanned copy (does not need to be in color)—**front** only.

## Georgia Citizenship Affidavit

- If we need to apply for a non-resident GA license, you will receive a separate email with an additional required document and instructions.

## Valid proof of eligibility to work in the US — for non-US citizens only

- Please provide a clear, easy-to-read **color** photo or scanned copy—both **front and back** of the document. The document must be current. (Make sure all 4 corners can be seen.)



## Review Checklist

- I have uploaded a clear color picture of the front and back of driver's license or state-issued ID.
- I have uploaded a clear picture of the front of SS Card.
- I have uploaded the completed fingerprint questionnaire and the **name matches** what is on my ID.
- If not a US citizen: I have uploaded a clear color picture of the front and back of proof of eligibility to work in the US (e.g., work authorization, permanent resident card).



## Frequently Asked Questions

### Can I upload multiple files?

- You can upload more than one file at a time by pressing on CTRL and then click on the files you want to select.

### What to do with duplicate uploads?

- If you see a duplicate upload, it's okay! The Licensing Department will clean it up. If you delete the duplicate, it will delete all copies from the portal.

### What to do if I uploaded the items in the incorrect section?

- If the items are not uploaded under the designated area, **it's okay!** We will still get the documents.