

Checklist

- Get information from team member on introduction call to add them to your book and to payroll.
- Have them apply for non-resident license if they aren't licensed in your state(s). Agent can reimburse on 1st check or have team member save login so agent can go in and pay.
- When gathering payroll information make sure they mark on their W4 that they have multiple jobs or ask for a certain flat amount to be withheld for federal taxes.
- If your remote team member isn't located in your state you will have to get an unemployment tax ID number in the state they are located in so they don't have to pay taxes in multiple states. There are a couple of companies that can process for you for a fee if your accountant or payroll company can't help you. Sarah Holtrup at sarah@profitableinsight.com or fill out the request for a phone call at Corpnet.com and tell them you need an unemployment tax ID in the state your team member is located in.
- Order workstation and yubikey or mail workstation from office if you are a sponsoring agent providing one. A yubi key can be ordered from Agents Online Catalog. Search Yubi key in upper right side.
- Add team member to Shared Folders.

Instructions:

For agent

In your email click on your email name

Data file

Permissions

Add

Permissions level

Editor (add more if wanted)

Apply-save-ok

Done

For staff

In your email click on your email name

Data file

Advance in the middle

Advance at the top

Add mailbox

Type in name or alias

Apply-save-ok

Done

- Submit for an agreement

- Submit for a mobile pass

Under State Farm forms

Search VPN Agency

Click on VPN ACCESS REQUEST

Fill out form

Submit

- Submit telephony request for outbound calls from softphone

On Agency Hub page

Click on forms icon

State Farm forms

Search telephony

Click on agent telephony request application.

- Set up onboarding call with team member to go over onboarding document