



# Getting Started Checklist

## Unlicensed

- ☐ You will need to complete the OSF (Outlining Success Form) that was texted or emailed to you. If you can not find it go to [Swattraining.info/gettingstarted](https://swattraining.info/gettingstarted) Step 8
- ☐ Once your OSF is completed, and ONLY when your OSF has been completed, you will get instructions on how to complete your contracting with Symmetry/Quility.

You will receive an email from [onboarding@quility.com](mailto:onboarding@quility.com), you can search for that email or the subject: **Invitation Created 90% of the time this will go to your spam or Junk folder**. You will need to click the Registration Link in the email. When registering you will need to register with the same email where you received the invitation.

- ☐ Please watch the short 2 min video for detailed instructions on how to fill out your contracting paperwork through the portal. <https://link.meetquility.com/l/DRoHMQiNMo>
- ☐ If you are not licensed already you will need to sign up for your Pre-Licensing course at: [XcelSolutions.com](https://XcelSolutions.com) Select the LIFE PRELICENSING course (no health) for your state. You should have received a discount code, via text or email, to use In the cart at checkout. If you can not find this go to: <https://swattraining.info/gettingstarted> on Step 3
- ☐ Once you are enrolled in your pre-licensing course, you will need to upload the receipt to your contract for Symmetry. You can return to your contracting portal at: <https://quilityonboarding.com/auth/login>



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- ☐ Let us know once you have registered for your course by submitting this simple 10 second form:  
<https://api.leadconnectorhq.com/widget/form/fiJaKDsGAccd7UAtuskT>  
*We've had people do everything in 5 days or less. We know you can be one of them*
- ☐ Please watch the short 2 minute video for tips & tricks to get through the course FAST:  
[https://link.meetquility.com/l/jOoV\\_lmLT7\\_](https://link.meetquility.com/l/jOoV_lmLT7_)
- ☐ Once you have completed your course, you will receive a certificate of course completion which you will need to upload to your Symmetry Contract Portal:  
<https://quilityonboarding.com/auth/login> When this is completed please fill out this simple 10 second form:  
<https://link.meetquility.com/l/HFcWZ7GkS>
- ☐ At this point, you should have already set up a time to take your state exam. Once you have passed your state exam you will need to upload your “passed exam letter” to your contracting portal:  
<https://quilityonboarding.com/auth/login>
- ☐ When you have completed the prior step you will receive an email from: [HQ@Quility.com](mailto:HQ@Quility.com) with the subject: **Congratulations on Passing Your Exam (Your Name)**  
This will give you step-by-step instructions to login to Quility HQ & to begin your Summit Training. You will only have partial access until you buy your license, print your license, & upload it to your contracting portal.

You will want to **STOP** after completing Basecamp in Summit and contact your mentor for a Mentor Check-in **PRIOR** to moving forward.



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- ☐ If you have not already been given access to our Exclusive SWAT 10-Step training program please click on this link to register: (use the same email that you originally used when you first onboarded with us) <https://swattraining.info/join>
  - ☐ When you have been approved for your Insurance Licence
    - ☐ Download and Save Resident License
    - ☐ Once state approves update your upline/agency owner
    - ☐ If all matches contract the HQ Onboarding system will update within 24-48 business hours
    - ☐ [Click Here:](#) to let us know when you have submitted
  - ☐ Once your contracting paperwork has been approved by Symmetry, you will receive another email from [HQ@Quility.com](mailto:HQ@Quility.com) with the Subject: [Your Symmetry Experience has been Upgraded \(Your Name\)](#). This will give you FULL access to HQ, Instructions for setting up your contracting profile in SureLC, & your login Credentials to OPT!, our lead CRM software system. **(This could take 24-72 hrs, if you do not receive this email, please contact your upline immediately)**
- NOTE: If you are already licensed or if for some reason you did not follow the instructions to get partial Access to HQ** once your contract is approved by Symmetry you will receive an email from [HQ@Quility.com](mailto:HQ@Quility.com) with the Subject: [Welcome to Symmetry \(Your Name\)](#) with complete instructions for logging into HQ, OPT! & SureLC
- ☐ Login into our 10 steps <https://swattraining.info/members> Go to the “Symmetry Onboarding Tab” and complete the entire section with full instructions on how to complete your onboarding. Download the Checklist below.

[Contracting w/ the Carriers Checklist](#)