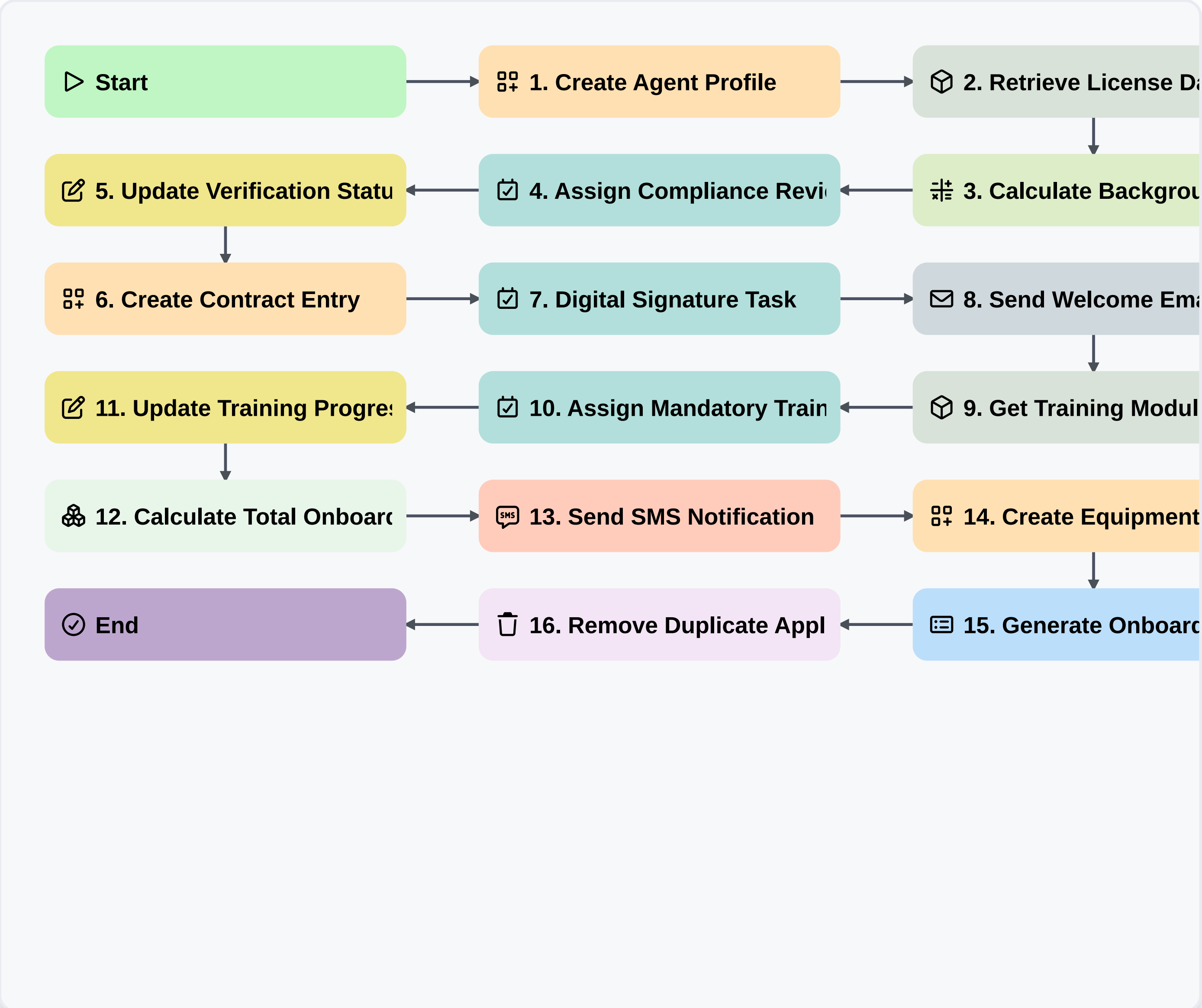
ChecklistGuro

Insurance Agent Onboarding Process



Start
Start of the Workflow/Process.

1. Create Agent Profile
Create a new entry in the 'Agents' data model with initial application details.

2. Retrieve License Data
Fetch details from the 'Regulatory Database' to verify the agent's license validity.

3. Calculate Background Check Score
Execute a formula to weigh various background check variables into a final risk score.

4. Assign Compliance Review
Create a task for the Compliance Officer to review the submitted documentation.

5. Update Verification Status
Update the 'Agent Profile' entry to mark the identity verification step as 'Complete'.

6. Create Contract Entry
Generate a new 'Contract' data entry linked to the Agent Profile.

7. Digital Signature Task
Create a task for the Agent to sign the onboarding agreement via the platform.

8. Send Welcome Email
Send a welcome email to the new Agent's email address containing login credentials.

9. Get Training Modules
Retrieve the list of required training modules from the 'Training Catalog' model.

10. Assign Mandatory Training
Create tasks for the Agent to complete specific compliance training modules.

11. Update Training Progress
Update the 'Agent Profile' to reflect completed training modules.

12. Calculate Total Onboarding Cost
Aggregate all costs (background checks, licensing fees, admin hours) to find the total onboarding expense.

13. Send SMS Notification
Send an SMS to the Agent to notify them that their credentials are now active.

14. Create Equipment Request
Create an entry in the 'IT Assets' model for company-issued hardware/software access.

15. Generate Onboarding Summary Report
Create a report summarizing the completed onboarding details for the periodic audit.

16. Remove Duplicate Application
Delete any duplicate 'Agent Application' entries found during the verification process.

End
End of the Workflow/Process.