
Onboarding Checklist

Welcome to QQCatalyst!!

The first step in your onboarding process is a setup call with our seasoned customer support agents. During this call, we will help you get your management system set up and configured for your agents.

In order to accelerate this process, please have the following items ready before your scheduled call:

1. **Carrier Fees:** The fees your carriers charge.
2. **Emails:** Email addresses that users can select when emailing from QQCatalyst.
3. **Carriers:** Your list of insurance carriers. *(Note: If you're planning to use electronic carrier downloads, you will need to gather each of the carrier NAIC codes.)* [Click here for the Carrier Lookup website.](#)
4. **Users:** A list of employees that will have access to QQCatalyst.
5. **Agency Fees:** The fees your agency charges your customers.
6. **Signatures:** Signature image file you want to apply to an ACORD form.
7. **Doing Downloads?** Please have your IVANS Y account ready. *(Note: If you don't have one, please contact your sales rep. We can set it up for you.)*

The call will last 20-30 minutes. We look forward to speaking with you soon!

Vertafore Customer Support Team

1.800.444.4813