

Is this the first time you've been invited to join APEXA and the first time you've begun your profile setup?



AGA



INSURANCE CARRIER



## YES

- 1 You will receive an email from [notifications@apexa.ca](mailto:notifications@apexa.ca) (please check your junk mail folder)
- 2 Click on [Get Started](#)
- 3 Enter your *First Name, Last Name, Email Address* and choose a *Password*
- 4 You will now receive an email from [notifications@apexa.ca](mailto:notifications@apexa.ca) (please check your junk mail folder) requesting that you confirm your email account
- 5 Click on the link provided in the email to confirm your email account
- 6 After being redirected to the APEXA login page, please log in
- 7 Begin your profile setup by filling out each section with your personal and financial information



- 1 Request a contract with your **AGA**
- 2 On your dashboard, click on [Request a New Contract](#)
- 3 From the options listed, choose "*I want to request a contract with a new company*"; click on [Next](#)
- 4 From the drop-down menu, search for the name of your **AGA** then click on [Submit](#)
- 5 Your request will be sent to your **AGA** who will approve it
- 6 Once approved, you will need to request a contract with **Carte Risk Management Inc. (the MGA)**
- 7 On your dashboard, click on [Request a New Contract](#)
- 8 From the options listed, choose "*I want to request a contract with a new MGA/AGA*"; click on [Next](#)
- 9 From the options listed, choose "*I want to go through another corporation to contract with the MGA/AGA*"; click on [Next](#)
- 10 From the drop-down menu, search for and choose **the name of your AGA**
- 11 From the drop-down menu, search for and choose **Carte Risk Management Inc.**; click on [Submit](#)

## NO

- 1 You will receive an email from [notifications@apexa.ca](mailto:notifications@apexa.ca) (please check your junk mail folder)
- 2 Click on [Add my Contracts](#)
- 3 Login to APEXA

Need APEXA system support? Call them at 1-855-294-2541 or send an email to [support@apexa.ca](mailto:support@apexa.ca)



- 12 Your request will be sent to your AGA, whom will approve it, at which time your request will be sent to **Carte Risk Management Inc.** who will prepare a contracting package to send back to you
- 13 You will receive an email from [notifications@apexa.ca](mailto:notifications@apexa.ca) (please check your junk mail folder) advising you that your contract is ready for completion and signing
- 14 Log in to APEXA; on your main dashboard, access the pending contract from **Carte Risk Management Inc.** under [Contracts Assigned to Me](#)
- 15 Follow the prompts to complete all requirements and electronically sign. Once signed, click on the [Submit](#) button and move the contract forward to the **MGA**
- 16 Within the next 24 hours you will receive an email from **MyBackCheck.com** in order to complete your criminal background check; please follow the prompts from that email to complete this process
- 17 The **MGA** will review your profile for errors and to verify that your criminal background check has been completed and successfully posted to your APEXA profile; if errors are found, the **MGA** will contact you with details and you will be required to fix those errors
- 18 Once all is in good order with your APEXA profile, the **MGA** will approve and onboard you

You can now request a new contract with an insurance carrier through the AGA & MGA on APEXA (for the carriers on APEXA) or request a paper contract (for the carriers not on APEXA) by emailing [contracting@cartewm.com](mailto:contracting@cartewm.com)