



Introducing Application Manager

January 25, 2021

Navigating into Application Manager from “My Business List”

PARTNER DASHBOARD Partner Tools ▾

Dashboard / My Business / My Business List

MY BUSINESS LIST

Cases Requirements Latest Activity

Time Frame Presets ▾

Search [Redacted] X

Type Product Campaign Status Application Method

All All All All All Reset

Select action... ?

Latest Activity ↑↓	Submitted/Effective	Company	Policy #	Type	Status	Application Method	Customer	Agent
01/12/2021 03:20 AM	01/12/2021	BNR	[Redacted]	Application	Pending - Application Started	Online App	[Redacted]	[Redacted]

Click on “Application” from the My Business List screen on Partner Dashboard. As long as application has been signed, you will be taken to the Application Manager.

Application Manager: Requirements

The tracker will show current status, with blue chevrons showing completed streams. The current open stream (green) will show status and timelines.

The Requirements section provides the needed requirement, status, the order date, received date, if the requirement has been reviewed, and the next follow up date.

The screenshot displays the 'Application Manager' interface for 'Legal & General'. At the top, it indicates 'Read-Only: This application is currently read-only.' Below this, the application details are shown: a redacted ID, a policy amount of '\$100,000', 'Male', and 'Age 66'. The product is 'OPTerm10' and it was signed on '01/21/2021'.

The 'Application Tracker' shows a progress bar with the following steps: 'New' (completed), 'Application Started' (completed), 'Application Signed' (completed), 'Further Evidence Required' (current step, highlighted in green), 'Underwriter Review' (pending), and 'Decision' (pending).

The 'Requirements' section is expanded, showing a table with the following data:

Requirement	Status	Owned By	Ordered	Received	Reviewed	Follow Up
Age >64 Client Questionnaire	Pending	LGA	01/21/21			
Amend Application	Completed	Proposed Insured	01/21/21	01/21/21		01/27/21
CA Form from Writing Agent	Pending	Agent	01/21/21			01/21/21
Exam	Completed	LGA	01/21/21		01/21/21	

At the bottom right of the requirements table, it shows 'Items per page: 10' and '1 - 4 of 4'.

Application Manager: Requirements

Application Tracker

New
 Application Started
 Application Signed
 Further Evidence Required
 Underwriter Review
 Decision

Requirements

Case Details

Policy Details

Agent

Beneficiary/Owner/Payor

Contact History

Application History

Inbound/Outbound Comms

1 of 3 Requirements Completed

Requirement	Status	Owned By	Ordered	Received	Reviewed	Follow Up
RTM	Pending	Proposed Insured	01/20/21			
Description Please upload below documents 1. Most recent W-2 AND most recent tax return OR 2. A letter from attorney/accountant confirming income and net worth.						
Amend Application	Completed	Proposed Insured	01/20/21	01/20/21		02/15/21
Exam	Pending	LGA	01/20/21			

Items per page: 10 1 - 3 of 3

For each requirement, you can click on it and drill down into more detailed

Exam document/report is available in the document section once it is complete and received.

Exam

Document History

Document not received.

Details

Overall Trending Decision	RUW - Standard Plus
Total Face Amount	\$6,000,000
Age	35
Gender	Female
Description Ordered Collect Blood Sample, Collect Urine Specimen (HOS), HIV Consent, Physical Measurements. Please refer the evidence reports for results.	
Created 01/20/21 11:27 am	

Application Manager: Case Details

Within Case Details, there are 3 sections of key information

The first section is Policy Details, which includes applicant information, initial underwriting class and proposed product details.

Legal & General

New Application Started Application Signed Further Evidence Required Underwriter Review Decision

Requirements

Case Details

Policy Details

Agent

Beneficiary/Owner/Payor

Contact History

Application History

Inbound/Outbound Comms

Applicant

D.O.B.	SSN	BMI	Height	Weight	Phone Number
[REDACTED]	[REDACTED]	18.24	5'8"	120 lbs	[REDACTED]
Email	Address	DL state	DL #		
[REDACTED]	[REDACTED]	AZ	[REDACTED]		

Underwriting

Tobacco Status	Insurance Age	Save Age	Initial Class	UW Team	Internal CM
No	53	No	Preferred	N/A	N/A

Product

Product	Initial Premium	Total Face Amount	Total Active & Pending Face Amount	WOP Requested	Policy Issue State
OPTerm15	\$323.05/Monthly	\$2,000,000	\$2,000,000	No	AZ
TIAA Opted	TIAA Offered	TIAA Reason	Term Rider	Child Rider	
No	No	N/A	N/A	N/A	

Application Manager: Case Details

Legal & General

Application Tracker

✓ New → ✓ Application Started → ✓ Application Signed → ✓ Further Evidence Required → **Underwriter Review** → Decision

Requirements

Case Details

Policy Details

Agent

Beneficiary/Owner/Payor

Contact History

Application History

Inbound/Outbound Comms

Agents

Code	Level	Agent	Status	Email	GA Code
[Redacted]	30	[Redacted]	A	[Redacted]	[Redacted]
GA Name	[Redacted]		Status Date	02/03/16	
GA Email	[Redacted]		Contract Date	02/03/16	
Phone	[Redacted]		Commission	100%	

The second section of key information is the agent information and details.

Application Manager: Case Details

Legal & General

- Requirements
- Case Details
- Policy Details
- Agent
- Beneficiary/Owner/Payor**
- Contact History
- Application History
- Inbound/Outbound Comms

Beneficiary

Type	First Name	Last Name	D.O.B	Relationship	Percentage %
All lawful children equally				All lawful children equally	100

Owner - Other Individual

Name	D.O.B	SSN	Relationship Insured	Phone Number	Email
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Address
[REDACTED]

Payor - Other Individual

Name	D.O.B	SSN	Relationship Insured	Phone Number	Email
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Address
[REDACTED]

The last piece of key information includes the beneficiary, owner and payor details.

Application Manager: Contact History

Application Manager

Progress: New → Application Started → Application Signed → Further Evidence Required → Under Review → Decision

SK Run M Agent
Logout

Reset

Search... Contact Reason Type Visibility

Visibility	Date	Type	Contact	Reason	Note	Changed By
🔒	01/22/21 02:17 pm	Phone	Applicant	Reissue Request	zCXas	Ruchi Yadav
Full Note: zCXas						
🔒	01/22/21 11:51 am	Phone				Jina Thottam
🔒	01/20/21 05:05 pm	Phone				Jina Thottam
🔒	01/20/21 05:02 pm	Phone				Jina Thottam
🔒	01/20/21 04:58 pm	Phone	Applicant			Jina Thottam
🔒	01/20/21 04:54 pm	Phone	Policy Owner	APS/Exam Vendor Complaint	sfsdfs	Jina Thottam
🔒	01/20/21 03:50 pm	Internal Request				Monalisa Bandyopadhyay
🔒	01/20/21 02:05 pm	Phone			test: QAUAT03	

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Contact History will let you see interactions with a customer and others involved in the application process.

Application Manager: Application History

Application Tracker

Requirements

Case Details

Contact History

Application History

Inbound/Outbound Comms

Visibility	Date	Status	Requirement	Note Detail	Change By
🔒	01/22/21 12:28 pm	Further Evidence Required	NA	Application Status changed from Underwriter Review ...	System
🔒	01/22/21 12:28 pm	Further Evidence Required	NA	Added note - Testing Advisr	Jina Thottam
🔒	01/22/21 11:58 am	Underwriter Review	NA	Added note - Test 8412 A	Jina Thottam
🔒	01/22/21 11:55 am	Underwriter Review	NA	Added note - Testing 8412	Jina Thottam
🔒	01/22/21 11:52 am	Underwriter Review	NA	Application Status changed from Further Evidence Re...	System
🔒	01/22/21 11:51 am	Further Evidence Required	NA	Added Contact History details - Phone	Jina Thottam
🔒	01/20/21 05:05 pm	Further Evidence Required	NA	Application Status changed from Underwriter Review ...	System
🔒	01/20/21 05:05 pm	Underwriter Review	NA	Added Contact History details - Phone	Jina Thottam
🔒	01/20/21 05:02 pm	Underwriter Review	NA	Added Contact History details - Phone	Jina Thottam

Application History displays the history of the case and includes the underwriting notes. An entry can be clicked on for more details.

Application Manager: Inbound/Outbound Communications

The screenshot displays the 'Application Tracker' interface. At the top, a progress bar shows the stages: New, Application Started, Application Signed, Further Evidence Required (highlighted in green), Underwriter Review, and Decision. On the left, a sidebar menu includes 'Requirements', 'Case Details', 'Contact History', 'Application History', and 'Inbound/Outbound Comms' (highlighted). The main area features a search bar and filters for 'Delivery', 'Recipient', and 'Category'. Below these is a table of communications.

Document	Date	Category	Recipient	Delivery
Medical exam needed for your life insurance application	01/20/21 02:05 pm	Notifications	Proposed Insured	Outbound
Application completion sms sent	01/20/21 02:05 pm	Notifications	Proposed Insured	Outbound
Application Package	01/20/21 02:05 pm	Application	Proposed Insured	Outbound
Privacy Policy	01/20/21 02:05 pm	Application	Proposed Insured	Outbound
AOL	01/20/21 02:05 pm	Application	Proposed Insured	Outbound
Replacement	01/20/21 02:05 pm	Application	Proposed Insured	Outbound
HIPAA	01/20/21 02:05 pm	Application	Proposed Insured	Outbound
Benefit Request 01	01/20/21 02:05 pm	Application	Proposed Insured	Outbound
Part 2	01/20/21 02:05 pm	Application	Proposed Insured	Outbound
Part 1	01/20/21 02:05 pm	Application	Proposed Insured	Outbound

Items per page: 10 | 1 - 10 of 11

Inbound/Outbound Comms is the section where policy documents can be viewed and uploaded (including the application, APS and exam), as well as all communications sent and received.

Application Manager: Underwriter Review

Once all evidence is captured and processed, the application will be in the "Underwriter Review" phase.

Requirements for the underwriting process will be included here, along with key dates so you understand where a case is in the underwriting process.

When underwriting review is complete, decision tab will be updated.

The screenshot displays the 'Application Manager' interface. At the top, a status bar indicates 'Read-Only: This application is currently read-only.' Below this, a summary card shows '23 Days Pending' and application details: 'Product: OPTerm15, Signed: 01/01/2021, \$200,000, Female, Age 37'. The 'Application Tracker' shows a progress bar with steps: 'New', 'Application Started', 'Application Signed', 'Further Evidence Required', 'Underwriter Review', and 'Approval'. The 'Underwriter Review' step is currently active. Below the tracker, a sidebar lists 'Requirements', 'Case Details', 'Contact History', 'Application History', 'Inbound/Outbound Comms', and 'Decision'. The main content area shows 'Final Decision Approved' by System on 01/01/21 at 02:37 pm. Three columns compare 'Applied For', 'Offer Made', and 'Offer Accepted' details, including Product & Face Amount, Term Riders, Child Riders, Premium, and Requested UW Class.

Applied For	Offer Made	Offer Accepted
Product & Face Amount OPTerm 15 \$200,000	Product & Face Amount OPTerm 15 \$200,000	Product & Face Amount OPTerm 15 \$200,000
Term Riders N/A	Term Riders N/A	Term Riders N/A
Child Riders N/A	Child Riders N/A	Child Riders N/A
Premium 122.34/SemiAnnually	Premium 122.34/SemiAnnually	Premium 122.34/SemiAnnually
Requested UW Class Standard	Decision Approved - RUW - Standard Plus	Decision Approved - RUW - Standard Plus
	Decision Reason Information provided by third party sources.	