

Interview Scheduler: New Capabilities



What the new scheduler does: Partner Dashboard

- Gives applicants the option to schedule or reschedule a phone interview to complete their application, should they need assistance or do not wish to complete the online application.
- Allows agents to choose an open interview time slot when dropping a ticket from the Partner Dashboard.
- **The new scheduler functionality does not yet apply to AppAssist business**, so clients will not be able to reschedule their AppAssist interview appointments online. They will need to call us to reschedule.
- When dropping a ticket using the **Apply By Phone With Link** option, the telephone interview date and time can be selected within a calendar that will allow the agency/agent to select the available interview slot within 3 weeks after the ticket is dropped.
 - With this option the client will receive an email with a link to complete their application online and the agent will also schedule an available interview day and time.
 - Over 90% of applicants complete the online application if given enough time. **We encourage agents to select an interview date that is no sooner than 3 days from the drop ticket date**, to allow the customer enough time to take advantage of the online application.

PARTNER DASHBOARD

- Dashboard
- My Business
- Illustrations
- Products
- Partner Information
- Commissions
- Licensing
- Forms
- Marketing and Resources
- Persistency

Partner Tools

Policy Genius

APPLICATION METHOD

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Broker Info

Client Info

Product Info

Application Method

Case Details

July 2020

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today

Clear

Great news! This case is eligible for our online application.

How would you like your client to apply?

Apply Online

Apply by Phone with Link

If you select Apply by Phone with Link, your client will be sent a link to complete the application online.

OPTerm 30

\$351.84

Annual

for \$500,000.00 of coverage
with a tentative class of
PreferredPlus

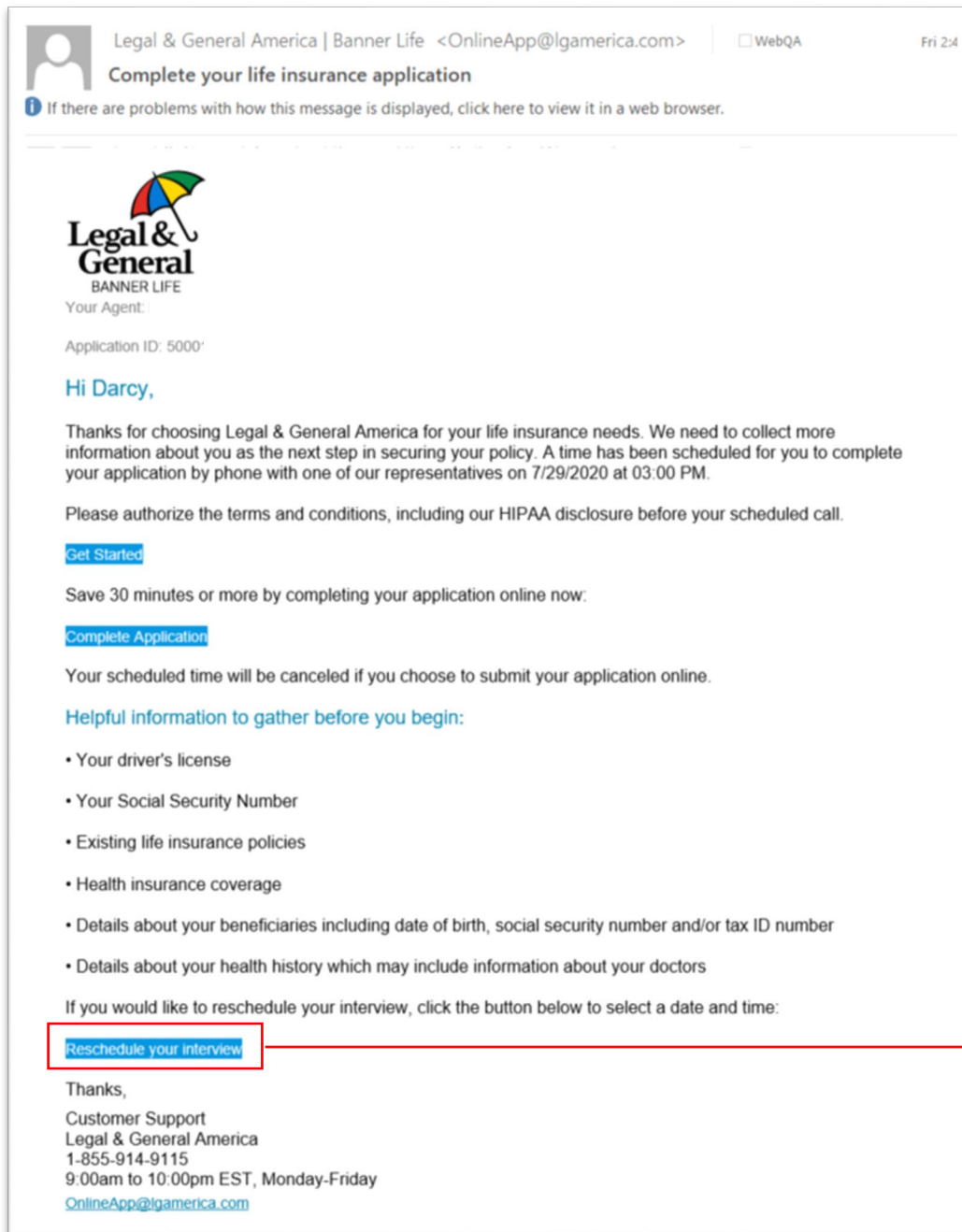
7/29/2020

Interview Contact Time - 3:00 PM (Eastern)

3:00 PM (Eastern)

Remarks

Paramedical Vendor



- The applicant will receive a **confirmation email** with their scheduled date and time.
- They will also have the opportunity to **authorize terms and conditions**, including HIPAA disclosure.
- The client can click **Complete Application** to start the online application process, which takes less than 20 minutes to complete.
- **If the applicant completes the online application** before the scheduled phone interview, the interview will be canceled.
- A link at the bottom of the email named **Reschedule your interview** will allow the client to reschedule the interview for another open interview slot, if needed.

- When dropping a ticket using the **Apply Online** option, a telephone interview is not scheduled.
- Applicants will receive an email shortly after with a link to complete the application online.

The screenshot shows the 'Legal & General' application interface. On the left is a dark blue sidebar with the company logo and a menu including 'Dashboard', 'My Business', 'New Ticket', 'My Business List' (highlighted), 'Requirements List', 'Latest Activity List', 'Reissue List', 'In Force List', 'My Uploaded Documents', and 'Document Search'. The main content area has a breadcrumb trail: 'Dashboard / My Business / My Business List / Application Method'. Below this is a blue header for 'APPLICATION METHOD'. A navigation bar contains 'Back to Search Results', 'Risk Evaluation', 'Quote Calculator', and buttons for 'Previous', 'Save/Update', 'Delete', and 'Next'. A progress bar shows five steps: 'Broker Info' (checked), 'Client Info' (checked), 'Product Info' (checked), 'Application Method' (checked and highlighted), and 'Case Details'. The main content area has a green background with the text 'Great news! This case is eligible for our online application.' and 'How would you like your client to apply?'. Two buttons are shown: 'Apply Online' (highlighted with a red box) and 'Apply by Phone with Link'. A note below the buttons states: 'If you select 'Apply by Phone with Link,' your client will be sent a link to complete the application online.'

Legal & General

Dashboard / My Business / My Business List / Application Method

APPLICATION METHOD

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[Risk Evaluation](#) [Quote Calculator](#) [Previous](#) [Save/Update](#) [Delete](#) [Next](#)

Broker Info ✓ Client Info ✓ Product Info ✓ Application Method ✓ Case Details

Great news! This case is eligible for our online application.

How would you like your client to apply?


[Apply Online](#) [Apply by Phone with Link](#)

If you select 'Apply by Phone with Link,' your client will be sent a link to complete the application online.

Legal & General America | Banner Life <OnlineApp@lgamerica.com> | WebQA

Complete your life insurance application

If there are problems with how this message is displayed, click here to view it in a web browser.



Your Agent:

Application ID: 5000

Hi Darcy,

Thanks for choosing Legal & General America for your life insurance needs. We need to collect more information about you as the next step in securing your policy.

[Complete Application](#)

This link will be available to you for the next 30 days.

[Helpful information to gather before you begin:](#)

- Your driver's license
- Your Social Security Number
- Existing life insurance policies
- Health insurance coverage
- Details about your beneficiaries including date of birth, social security number and/or tax ID number
- Details about your health history which may include information about your doctors

If you would like to complete your life insurance application over the phone, [schedule a time now.](#)

Thanks,
Customer Support
Legal & General America
1-855-914-9115
9:00am to 10:00pm EST, Monday-Friday
OnlineApp@lgamerica.com

- In the initial application email and in all subsequent reminder emails, **a new option to schedule a telephone interview** will be available at the bottom of the email named **schedule a time now.**
- The applicant will receive an email and text reminder (text notifications will occur if the agent provided a cell phone and opted in during the drop ticket process) to complete their application. **Reminders are sent 2, 4, 7 and 15 days** after the initial application email is sent. The online application link will expire after 30 days.

What the applicant sees when they schedule or reschedule a phone interview:

- If an applicant clicks either 'Schedule a time now' or 'Reschedule your interview', the **Applicant Welcome Screen** will open.
 - The customer will be asked to enter the last four of their Social Security Number for verification



Welcome!

Please provide the information below to continue.

Last four of SSN

Continue >

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Accept

- Once inside the **Schedule An Appointment screen**, the applicant can choose an open date and time.
- Unavailable time slots will be grayed out

Welcome, PETER!

Here you will be able to make an appointment with one of our agents and get help with your application. You can schedule and interview call to start your application or continue where you left off.

Schedule an Appointment

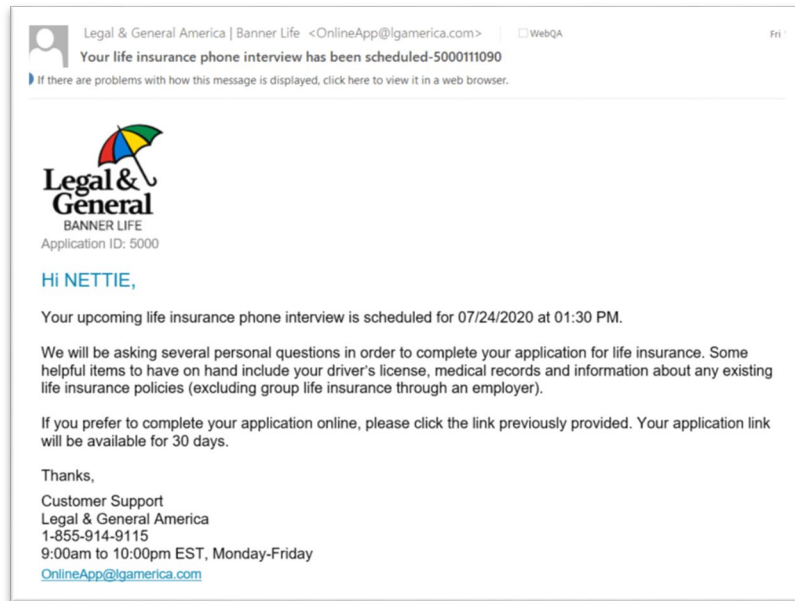
Morning Afternoon Evening View All

< July 20 - July 25 >

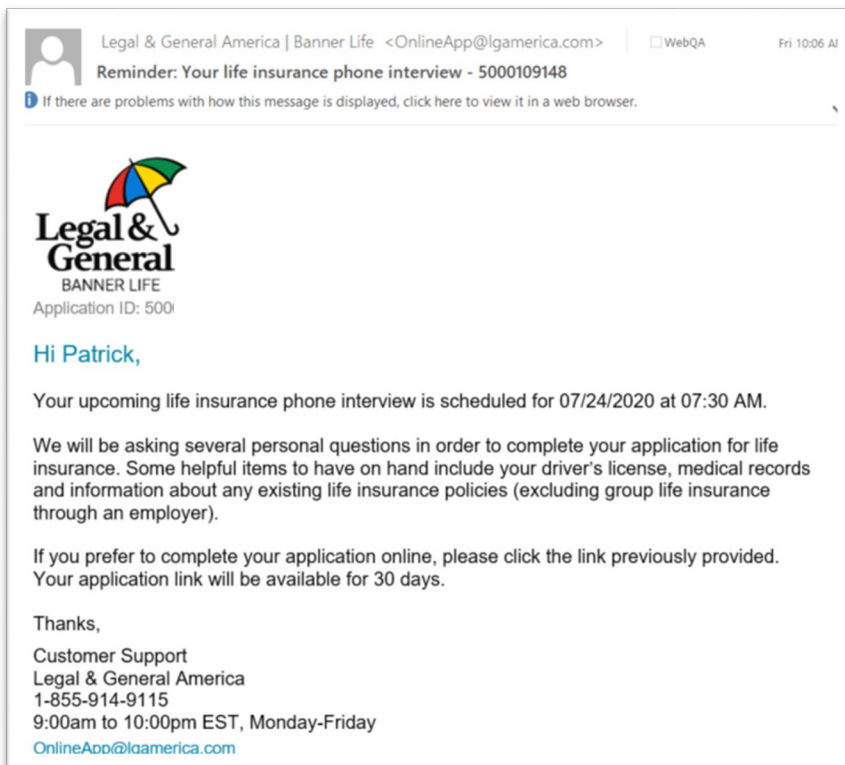
Mon 20	Tue 21	Wed 22	Thu 23	Fri 24	Sat 25
12:00 PM	12:00 PM	12:00 PM	12:00 PM	12:00 PM	12:00 PM
12:30 PM	12:30 PM	12:30 PM	12:30 PM	12:30 PM	12:30 PM
01:00 PM	01:00 PM	01:00 PM	01:00 PM	01:00 PM	01:00 PM
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02:00 PM	02:00 PM	02:00 PM	02:00 PM	02:00 PM	02:00 PM
02:30 PM	02:30 PM	02:30 PM	02:30 PM	02:30 PM	02:30 PM
Date	Time		EDT		

Confirm

Rescheduled email confirmation to the applicant



24-hour email notice for upcoming phone interview



How the new scheduler affects iPipeline users

- The full functionality of the scheduler, such as choosing an available interview time for applicants is not yet available on iPipeline.
- At this time, agents will continue to select a preferred 'Best Time To Call' 30-minute time slot for a potential interview time.
- **If the applicant does not qualify for the online application**, we will schedule an interview with our AppAssist team, using our current process, as close as possible to the preferred interview time.
- **Reminder: the new scheduler functionality does not yet apply to AppAssist business**, so clients will not be able to reschedule their AppAssist interview appointments online. They will need to call us to reschedule.
- **Applicants who qualify for the online application** will receive the same initial email and reminder cadence as above, as if the ticket was dropped using the 'Apply Online' option in Partner Dashboard.
 - **What has changed** is that within the initial email and email reminders, customers will be able to schedule an interview if they would like to complete their application over the phone.
 - **If the client has scheduled an interview but we cannot reach them**, we will follow our normal follow-up procedure.
 - **If the online application has not been completed or no interview scheduled**, we will attempt to call the applicant 5, 10 and 13 days after the initial application email is sent.