

Legal & General America | Digital Application Platform | July 2020

Preferences and Email Options Available



What it does:

- New Preferences options allow GAs to assign multiple email addresses to receive notifications by function (Application Journey, Underwriting, Final Decision).
- **Reminder:** In this section the GA can also select whether the applicant is to receive final decisions directly from LGA.

How to update Preferences:

- Click on the down arrow located next to the name in the upper right corner.
- Select **Partner Preferences**.

The screenshot shows the 'PARTNER DASHBOARD' header with a user ID 'D2C0000' and a 'Select a broker' dropdown. The left sidebar contains navigation links: Dashboard, My Business, Illustrations, Products, and Partner Information. The main content area features a banner with the text 'Easier. Faster. Better' and a 'MARKETING L' section. A user profile dropdown menu is open, showing options: User Profile, Partner Profile, Partner Preferences (highlighted with a red box), and Log out. Below the banner is a 'MY BUSINESS LIST' table.

| Latest Activity | Submitted/Effective | Company | Policy # | Type | Status | Application Method | Customer | Agent |
|---------------------|---------------------|---------|----------|-------------|---------|--------------------|----------|-------------------------------|
| 06/19/2020 10:00 AM | 06/19/2020 | BNR | | Application | Pending | Online App | | BANNER LIFE INSURANCE COMPANY |

- Click on the green **Digital Application Preferences** button.

The screenshot shows the 'PARTNER DASHBOARD' header with a 'Select a broker' dropdown. The left sidebar contains navigation links: Dashboard, My Business, Illustrations, Products, Partner Information, and Commissions. The main content area features a 'DASHBOARD' header and a section for 'BANNER LIFE INSURANCE COMPANY (D2C0000)'. A 'Change Preferences' section is visible, with a green 'Digital Application Preferences' button highlighted by a red box. Below this, there are two sections: '1. Broker Access' with a radio button selection for 'Yes' (selected) and 'No', and '2. New Business Requirements Notification via email'.

How to update Default Email Preferences:

- The **Online Applications** screen opens.
- The GA can choose one or multiple email addresses (up to 10) to receive notifications during the Application Journey, Underwriting and Final Decision. Note: each email address entered will receive the same notification by function.

The screenshot shows the 'Online Applications' settings page. At the top right, there are 'Save' and 'Discard' buttons. Below the header, a note states: 'The following settings will only apply to digital application policies. Once the change is made, this will apply to all going forward.' The main section is titled 'Default Email Preferences' and includes the instruction: 'Set default email(s) for different stages throughout the application process. If none are provided the emails will be sent to: agency@agency.com'. There are three sections: 'Application Journey' with a text input 'Test@gmail.com' and a '+' icon; 'Underwriting' with a text input 'Test@lga.com', a '+' icon, and a checkbox 'Same as Application journey'; and 'Decision Made' with a text input 'Test@gmail.com', a '+' icon, and a checkbox 'Same as Application journey'.

- Click the **Plus sign symbol** to add more emails within each section.

This is a close-up of the 'Application Journey' section. It shows three text input fields. The first contains 'Test@gmail.com' and has an 'X' icon to its right. The second is empty and contains the placeholder text 'Enter Email', also with an 'X' icon. The third is empty with 'Enter Email' and has an 'X' icon and a '+' icon to its right. The '+' icon is highlighted with a red square.

How to update Final Decision Preferences:

- Within the **Online Applications** screen scroll to the bottom section.
- Options include what information and how it will be displayed to the applicant during Final Decision. Customizations may apply to the offer screen, email, or text (SMS) depending on which forms of communication have been opted into.

Final Decision Preferences

Final Decision Offer Screen

When a decision on a case is made, the client will be directed to a screen that displayed their final offer including premium and a reason for the decision if applicable.

- Show client offer screen.
- Only show my client the offer screen for policies that are approved as applied for. For 'other than applied for' cases, we will only show the policy has been approved. We will not display the premium or a reason.
- Do not show client an offer screen.

Final Decision Email

After a final decision is made, we will send the client an email with their offer including final premium and a reason for the decision, if applicable.

- Send my client an email for any decision made including those that are 'other than applied for'.
- Only send my client an email for policies that are approved as applied. For 'other than applied for', we will only show the policy has been approved; we will not display the premium or a reason.
- Do not send my client an email when a final decision has been made.

Final Decision SMS

If the client has opted in for SMS, once a final decision is made, we will send them a notification about the policy decision.

- Send my client an SMS for any decision made including those that are 'other than applied for'.
- Only send my client an SMS if the policy is approved as applied. For 'other than applied for', we will only show the policy has been approved; we will not display the premium or reason.
- Do not send my applicant an SMS when a final decision has been made.

- Click **Save** at top right of the screen to update preferences. Changes will apply to all digital applications going forward.

Online Applications

Save

Discard

The following settings will only apply to digital application policies. Once the change is made, this will apply to all going forward.

Default Email Preferences

Set default email(s) for different stages throughout the application process. If none are provided the emails will be sent to: