

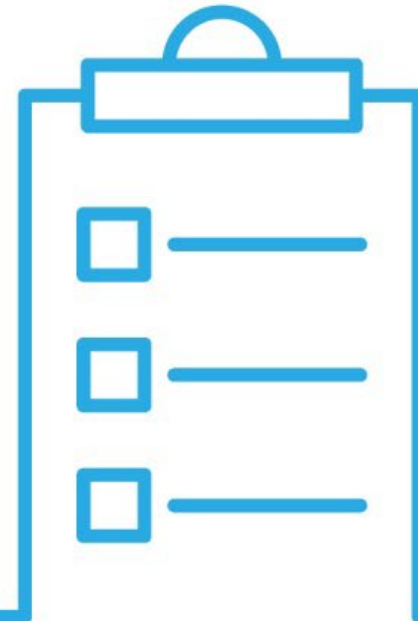
# Doc Upload

Imaging process

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# The Basics

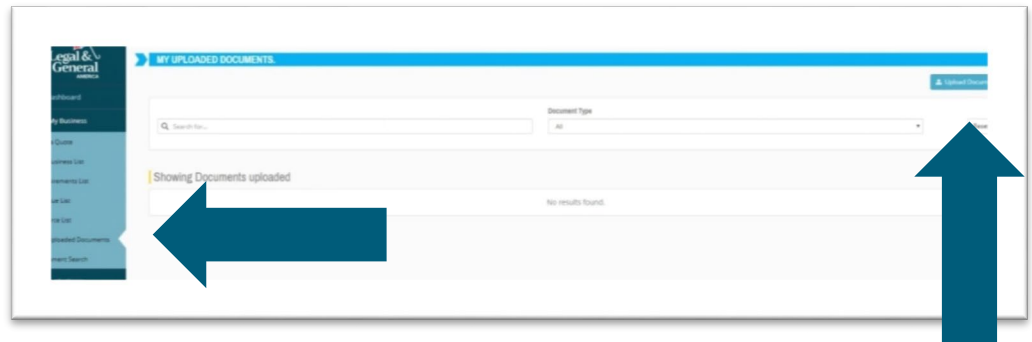
- You will need a device that will scan your documents or software that allows you to save documents in acceptable formats so they can be uploaded as images
- LGA has time-tested experience with documents imaged using a wide variety of devices
- All you need to do is follow our instructions for document scan settings and online document identification
- You won't need third-party vendor involvement unless that's your preference
- Submit is just a click away



# Online Doc Upload

On our Partner Dashboard, [partner.lgamerica.com](http://partner.lgamerica.com)

- You can upload scanned documents in seconds
- It's Check21 ready
- All it takes is a few facts about the document
- Find the Upload Document button by
  - Selecting the New Business tab
  - Selecting My Business, My Business List, a Pending App



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# Document Packaging

## Banner / William Penn accept:

- A single page document
- A multiple page document – all the same doc type – for one client (preferred, but not required)

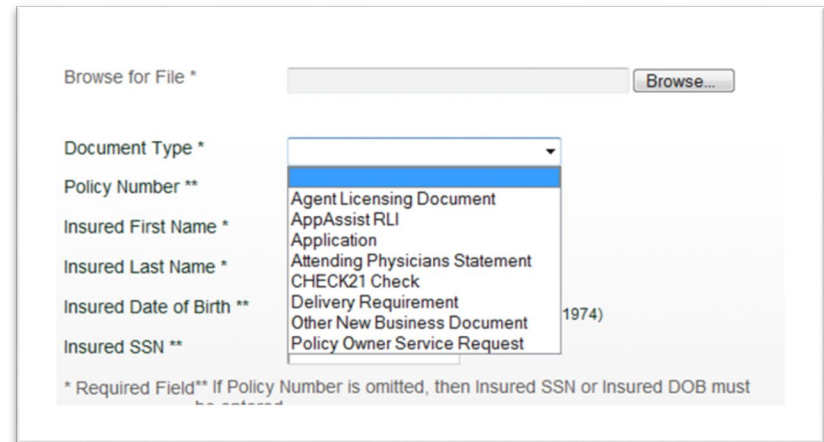
# Online ID of Your Image

## Required input fields:

- Document type
- Insured (or proposed insured) first and last name
- Insured date of birth or social security number

## Preferred, but not required input fields:

- Policy number
- If policy number is omitted, then insured SSN or insured DOB must be entered



The screenshot shows a web form with the following fields and options:

- Browse for File \***: A text input field with a "Browse..." button.
- Document Type \***: A dropdown menu with the following options: Agent Licensing Document, AppAssist RLI Application, Attending Physicians Statement, CHECK21 Check, Delivery Requirement, Other New Business Document, and Policy Owner Service Request.
- Policy Number \*\***: A text input field.
- Insured First Name \***: A text input field.
- Insured Last Name \***: A text input field.
- Insured Date of Birth \*\***: A text input field with a placeholder "(1974)".
- Insured SSN \*\***: A text input field.

\* Required Field\*\* If Policy Number is omitted, then Insured SSN or Insured DOB must be entered

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# Application Upload

## When you want to upload an application:

- Choose Application as the document type
- This document type can only be used for a first-time application that needs a policy number

## Image must include the Release of Health-Related Information (HIPAA) form

- This form is state-specific

## Image must include pages 1, 2, 3, 4, 5, 12 (11 for Penn):

- If any of these pages are missing, it will delay the processing and the application may be rejected
- If you are sending another application for an existing policy number you can use this document type, but reference the existing policy number in the cover memo

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# Other eDoc Uploads

- All delivery requirements except live check images
- Attending physician statements
- Agent licensing documents
- Other New Business documents – pending or issued within 60 days
- Policy owner service requests for inforce policies
- Request for Life Insurance Interview – AppAssist RLIs
- Check21 checks – see presentation on our microsite [www.lgamerica.com/edocuments](http://www.lgamerica.com/edocuments)

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# Image Settings

File Format for LGA Website Upload:	TIF, TIFF or PDF
File format for PaperClip Or ExamOne Upload:	TIF, TIFF or PDF
Page size:	8.5" x 11"
Color:	Black and White
Resolution:	300 DPI for TIF or TIFF 300 DPI for PDF
TIF/TIFF Compression:	Group 4



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# About Originals

## Banner / William Penn do not require copies of originals to be sent to our office

- Your agency must retain the original documents for 60 days and then destroy the documents through a secure shredding process
- Retention requirement is 30 days for checks
- A signed agreement is required for processing checks

# Questions?

- Learn more on our microsite  
[www.lgamerica.com/edocuments](http://www.lgamerica.com/edocuments)

## Still have a question?

- Call your internal wholesaler
- 1.800.638.8428



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# Disclosure

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