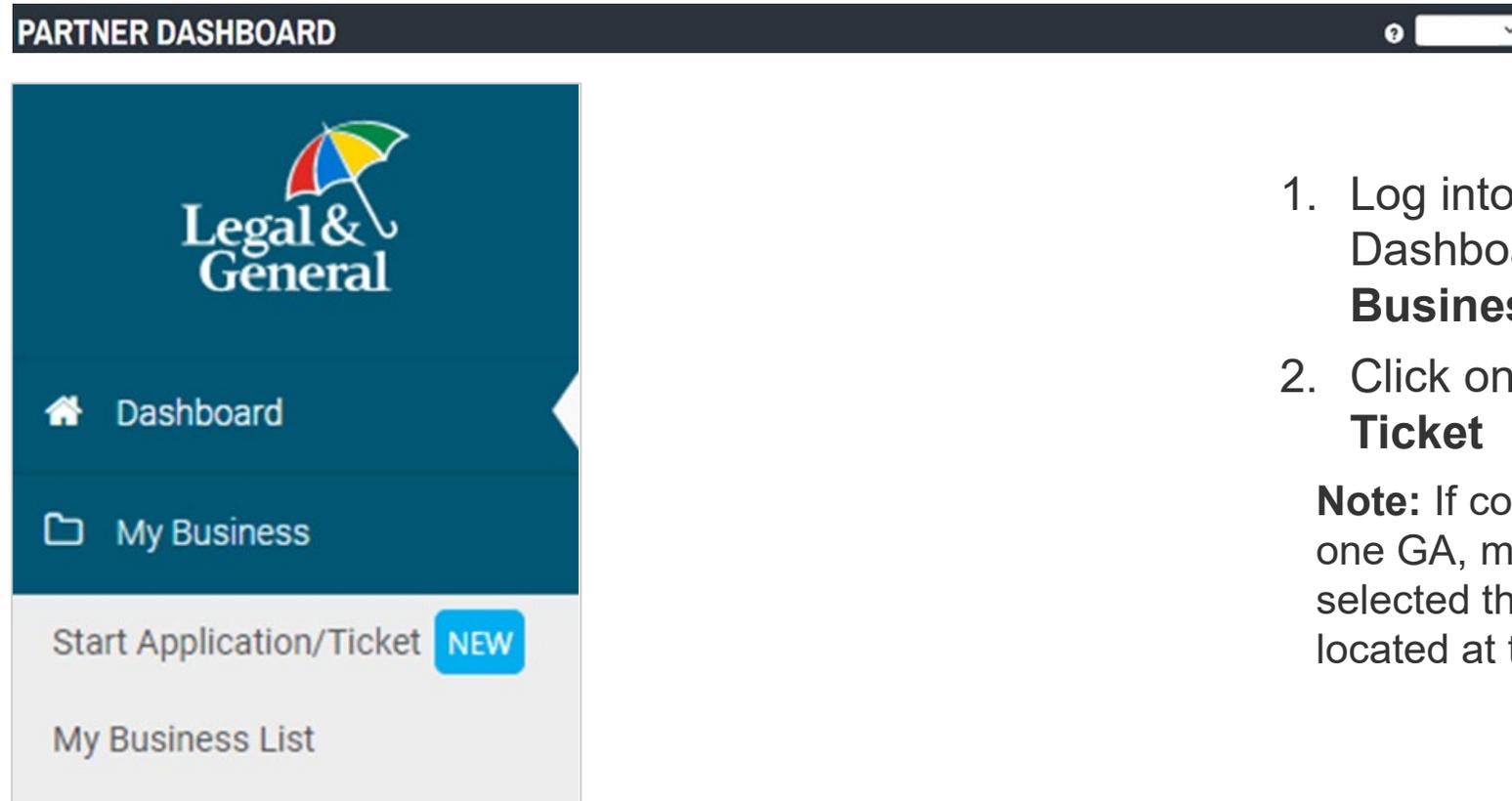




# Drop a ticket from Partner Dashboard

Last updated November 2022

## Drop a ticket from Partner Dashboard



1. Log into the Partner Dashboard and click on **My Business**
2. Click on **Start Application / Ticket**

**Note:** If contracted with more than one GA, make sure you have selected the correct advisor code located at the top of the screen

## Drop a ticket from Partner Dashboard



A screenshot of the Legal &amp; General Partner Dashboard. The top left corner features the Legal &amp; General logo. Below it is a navigation menu with four items: "Application Information", "Your Policy", "About You", and "Health History", each with a downward arrow. The main content area has a blue header with the text "Start a new application for your client!" and "Our advisor experience gives you the opportunity to guide your client through every step of their life insurance application". Below the header, there are three sections: "Application Information Section:" with a note that the entire section must be completed before saving; "Drop a Ticket:" which offers to send the application to the client or schedule an appointment; and "Digital Application:" which states it is quick and can be completed in 20-30 minutes. A section titled "Here's some useful client information to have on hand:" lists "Client's personal information including last 4 of SSN", "Driver's license information", and "Medical information". At the bottom center is a blue button labeled "Next" with a right-pointing arrow.

### 3. Landing page

- a. When using the GA link, you will land on this page
- b. Select **Next**

## Drop a ticket from Partner Dashboard



**Advisor Information**

**ⓘ** In order to proceed with this application, advisor must provide either the **advisor code** or the **NPN** and must be licensed in both the insured's and the policy owner's state (if they are different).

GA Code	GA Name	Communication Email <b>?</b>
		No email on file

Please enter the below information for each advisor.

Primary Advisor Code <b>?</b>	NPN <a href="#">Lookup your NPN</a>	SSN/TID
<input type="text"/>	<input type="text"/>	xxx-xx-3343
First Name	Last Name	Split %
<input type="text"/>	<input type="text"/>	100.00%

I am not contracted

**+** Add Advisor

**Case Notification (Optional)**

Email Address

**Next** >

[Need Help?](#)

**Look up your NPN** ✕

The National Producer Number (NPN) is a unique National Association of Insurance Commissioners (NAIC) identifier assigned through the licensing application process. Fill out the information below to look up your NPN.

Last Name

SSN/TID

### 4. Advisor Information

- a. Please review the GA name at top to ensure this is the correct agency the business is to be submitted through
- b. If needed, enter your advisor code; if you do not know your code, enter your national producer number (NPN) and last four of your social security number or TIN, depending on how you are licensed
- c. If not contracted with this GA check the **I am not contracted** box; enter NPN and last 4 of SSN or TIN
- d. Select **Next**

**Note:** If you do not remember your NPN click on **Lookup your NPN**

## Drop a ticket from Partner Dashboard



### Client Information

Personal information of client is mandatory to get instant decision and SSN is mandatory to complete the ID verification and complete the application.

Please enter any missing information below:

Name		
First Name	Middle Name (optional)	Last Name
Gender		
-- select--	Date of Birth	Last 4 digits of SSN
	MM/dd/yyyy	ssn
Address		
address line 1		
address line 2 (optional)		
City		
city	State	Zipcode
	-- select--	zip
Email Address		Confirm Email Address
email		confirm email
Phone Number		Confirm Phone Number
	Mobile	
Save Age to set effective date based on younger insurance age <a href="#">More details</a>		
<input type="radio"/> Yes		
<input checked="" type="radio"/> No		

Next >

Need Help?

## 5. Client Information

- Complete all fields
- Select **Next**

**New:** We now have the ability to Save Age; If your client wants to save age click **Yes** in the bottom left corner



### Pro Tip

The state of sale is based on where the owner resides; please make sure you are licensed in that state.

## Drop a ticket from Partner Dashboard



### Policy Information

**New** You can now submit more than one OPTerm policy within an application. Please click 'Add Policy' to add additional policies.

Product Type [Learn More](#)  
OPTerm

Coverage Length  
40 Years

Purpose of Insurance  
Personal

Coverage Amount  
\$ 500,000

Underwriting Class  
Preferred Plus

Table Rating  
--Select--

Billing Frequency  
Annually

Term Riders

10 years  
\$

15 years  
\$

20 years  
\$

Child Rider  
 \$5,000  \$10,000  Not Interested

Waiver of Premium  
 Add Coverage  Not Interested

Temporary Insurance Coverage  
 Add Coverage  Not Interested

Premium Amount  
**\$ 504.13**

+ Add Policy

Next

## 6. Policy Information

- Complete the appropriate fields
- Select **Next**



### Pro Tip

If the client is applying for more than one policy click +Add Policy located in the bottom left corner.

This will allow you to enter the policy information for each policy needed (up to 3 total).

When completing the applications the client will only need to repeat the Your Policy details.

## Drop a ticket from Partner Dashboard



Application Information

- ✓ Advisor Information
- ✓ Client Information
- Policy Information**
- Advisor Attestation
- Continue Application

Your Policy

About You

Health History

### Policy Information

**New** You can now submit more than one OPterm policy within an application. Please click 'Add Policy' to add additional policies.

✓ **Policy 1: OPterm 25**  
Coverage Length 25 Years · Coverage Amount \$500,000 · Estimated Premium \$366.65 annually

**Policy 2**

Product Type [Learn More](#)

OPterm

Coverage Length

--Select--

Purpose of Insurance

--Select--

Coverage Amount

\$

Underwriting Class

--Select--

Table Rating

--Select--

Billing Frequency

Annually

Term Riders

10 years

15 years

20 years

\$

Child Rider

\$5,000  \$10,000  Not Interested

Waiver of Premium

Add Coverage  Not Interested

Temporary Insurance Coverage

Add Coverage  Not Interested

Premium Amount

\$

*This will apply to all policies in this application.*

If multiple policies are needed, enter the policy information for next policy (can apply for up to 3)

When completing the applications, the client will only need to repeat the 'Your Policy' details

### Advisor Attestation

We will rely on information provided by you. The answers to the questions you ask and collect from your client will be the basis for us to issue a life insurance policy. The answers provided to us will be made a part of the policy. Every answer you provide to us must be truthful, complete and accurate to the best of your knowledge. As an advisor, your responsibilities include, but are not limited to:

- Ensuring your client does not require a translator.
- Asking all questions exactly as presented, including scenarios where gender specific conditions must be asked to all clients.
- Making us aware of any information that would adversely affect your client's eligibility, acceptability, or insurability.
- Asking your client, the appropriate questions to ensure that the product, with the length and amount of coverage being applied for, is in the best interest of, and suitable for, your client.
- Ensuring you are a licensed life insurance agent in the state where your client lives. If you are not currently appointed, you will get appointed before the policy is finalized.
- Providing complete and accurate information in a timely manner, including all required forms (including any required notices)

**By clicking the blue button below, you agree that:**

You will work with your client to ensure that accurate and honest information is provided. You understand that if the wrong information is received, your client could miss out on coverage benefits.

You authorize Legal & General America to obtain any necessary administrative information order to complete this life insurance application. You understand that any information needed from your client requiring action and/or advice from a licensed life insurance agent will be referred to you for before the application can be completed.

[I Agree >](#)

[Need Help?](#)

Legal & General America life insurance products are underwritten and issued by Banner Life Insurance Company, Urbana, MD and William Penn Life Insurance Company of New York, Valley Stream, NY. Banner products are distributed in 49 states and D.C. William Penn products are available exclusively in New York; Banner does not solicit business there. The Legal & General America companies are part of the worldwide Legal & General Group. 19-094

Application Reference #: 100008361  
Policy #: 5100083172, 5100083173

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## 7. Advisor Attestation

- Click **I Agree** to the terms and conditions

**Note:** Application reference number and policy number(s) will appear in the bottom right corner

There is one Application Reference number and will link all associated applications

Policy number will be unique for each policy applied for

## Drop a ticket from Partner Dashboard



Application for  
You can complete the entire application with your client, send it to the client to complete, or schedule an AppAssist Interview.

**Continue along with your client**  
Use our quick and easy application – most advisors complete it within 30 minutes. Remember, your client must agree to our HIPAA authorization before starting the 'Health History' section.

[Continue Digital Application](#)

**Give your client the control**  
This gives you the option to send the application to your client to complete independently or schedule a time for your client to complete their app over the phone with our AppAssist team.

[Send To Client Or Schedule Interview](#)

Need Help?

8. To Drop a ticket click on **Send To Client or Schedule Interview** button

**Note:** This will allow the client to complete the application themselves online or complete the application over the phone with our call center staff

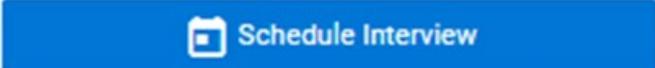
## Drop a ticket from Partner Dashboard



Select Application Method ✕

You have two options when dropping a ticket. You can either schedule an interview with one of our AppAssist agents or you can send the digital application to your client via an email link.

 Send to Client

 Schedule Interview

Cancel

### 9. Drop a ticket: 2 options

- Send the digital application to your client via an email link or
- Schedule a phone interview with one of our call center staff

## Drop a ticket from Partner Dashboard



Send to Client ✕

Are you sure you want to send the digital application to your client via email link? Once they receive the link they will be able to complete it on their own.

< Back ➤ Send to Client Cancel

  
**Your email has been sent!**

Your changes have been saved and email has been sent to your client with a link to the application.

Close

### 10. Send link to client via email

- Click **Send to Client**
- Receive confirmation that the email has been sent

## Drop a ticket from Partner Dashboard



Schedule Confirmation

Schedule an AppAssist interview for your client by selecting a date and time below.

*Times are scheduled in the customer's timezone.*

Morning Afternoon Evening **View All**

< May 23 - May 28 >

MON	TUE	WED	THU	FRI	SAT
23	24	25	26	27	28
08:30 AM					
09:00 AM					
09:30 AM					
10:00 AM					
10:30 AM					
Date	Time	EDT			

< Back **Schedule Interview** Cancel

### 11. Schedule a phone interview

- You can schedule a phone interview by selecting a day and time and click on the **Schedule** button

## Drop a ticket from Partner Dashboard



**From:** "Banner Life | Legal & General America"  
**To:**  
**Date:** 02/03/22 04:09 PM  
**Subject:** Complete your life insurance application  
**Bcc:**

---

  
Application ID:  
Hi

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](#)

---

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](#).

Thank you,

Customer Support

Banner Life Insurance Company | A Legal & General America Company  
1-855-914-9115  
9:00am to 10:00pm EST, Monday-Friday  
[OnlineApp@lgamerica.com](mailto:OnlineApp@lgamerica.com)

12. An email will be sent to your client
  - a. Sent from:  
'Banner Life | Legal & General America'
  - b. Subject line: Complete your life insurance application
  - c. If a phone interview has been scheduled the date and time will be included
  - d. The client can schedule an interview if not already scheduled, they can also reschedule if previously scheduled by clicking on the "schedule a time now" link in the email



**The process is simple.  
Your peace of mind,  
immeasurable.**

Thank you for choosing Legal & General America for your life insurance needs. You're on your way to protecting the people who rely on you most.

**What happens now?**  
You should have received an email from us with a link to complete your life insurance application online. The process should only take about 20 minutes.

You will be asked questions about your medical and financial history. This information will only be used for insurance coverage consideration and will be kept confidential in accordance with our privacy policy.

If you need help along the way, you can contact us at any time with questions.

If you chose to complete your application over the phone, you'll spend about 45 minutes with an experienced interviewer. You'll listen to a series of recordings, which provide the necessary authorizations required by your state before starting the life insurance application.

**A short medical exam**  
If needed, we may schedule a free 30-minute medical exam. A trained medical examiner will take your height, weight, blood pressure and pulse, collect blood and urine, and possibly conduct an EKG, and/or complete a medical history report.

**Exam preparation tips**

- avoid strenuous exercise the day before
- get a good sleep the night before
- don't eat solid foods or drink alcohol eight hours before
- don't use tobacco or drink caffeinated beverages one hour before
- drink a glass of water one hour before

**Helpful documents to have on hand**  
While we can help you look up some of your medical and prescription history, it will help if you have some of the following information on hand during your interview:

- driver's license and Social Security numbers
- names, addresses and phone numbers of doctors, clinics and hospitals visited in past 10 years
- reasons for and dates of medical treatment
- names of prescription medicines
- other life insurance policies, including company names, coverage amounts and policy numbers
- financial information, including income, assets, liabilities and net worth

Your life insurance goes into effect only after we approve your application and receive your first premium payment as well as any outstanding policy requirements.

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[Click here to view flyer](#)

### 13. Share 'What to Expect' flyer with your client

- This flyer explains the application process. It includes what helpful documents to have on hand and exam prep tips (in case they need an exam.)

**Thank you for your business.**

