



Introducing the new **Applicant Portal**

A simplified, centralized way for applicants
to track their application.

What's new?

A modernized, self-service applicant experience

- One centralized portal for applicants to view and track their application.
- No more separate links sent for every document or requirement.
- Applicants can:
 - View policy status
 - Complete outstanding actions
 - Update personal and application details
 - Track progress through the entire application journey

Key benefits

For applicants:

- Clear timeline and visibility into application status
- Less confusion, one link
- Faster response time to complete tasks

For you:

- Fewer follow-up calls and support requests
- Improved client experience
- More efficient case management

Portal overview


Homepage view


- Welcome message and application reference number
- Visual cue of how many actions are needed
- Clear next step: **“Complete Application”**
- Application due date is displayed
- Status clearly marked (e.g., “Application Started”)


Welcome !

Application for Life Insurance

Stay on top of your life insurance application with a clear view of actions and details.

 You have 1 action to complete

 Application Reference #1000576046

Policy #	Status	Description/Action	Action Due Date	Details
5100653109	Application Started	You have started your application, but it is not yet complete. Please click 'Complete Application' to sign and submit for review. <div> Your application will be closed if not actioned within due date.</div> <div>Complete Application</div>	May 03, 2025	<div>View</div>

Policy snapshot

- Policy number, coverage amount and term length shown at the top
- Action required banner for easy next steps
- Visual tracker shows progress (Application Started to Active)

Policy overview page

Home > Policy #5100653109

Policy #5100653109

📄 Application Reference #1000576046 ↕ Status **Application Started**

Coverage Length 30 Years	Coverage Amount \$100,000	You have started your application, but it is not yet complete. Please click ' Complete Application ' to sign and submit for review.	Action Due Date May 03, 2025
------------------------------------	-------------------------------------	--	--

⚠ Your application will be closed if not actioned within due date.

[Complete Application](#)


📊 Track Your Application

Application Started Application Signed In Underwriting Offer Made Offer Accepted Paid Active


Personal and product information






- Quick access to:
 - Application details (DOB, address, contact info)
 - Product details (coverage length, riders, waiver or premium)
 - Policy owner, agent info, beneficiaries
- Trackable progress bar gives transparency to every stage

Details breakdown


Track Your Application

Application Started
Application Signed
In Underwriting
Offer Made
Offer Accepted
Paid
Active


Policy Details

 Agent Details
 Policy Owner
 Beneficiary
 Payor
 Download Center

Applicant Details

Name	Gender	Date of Birth	SSN
Jay D Olsen	Male	12-Dec-1998	XXX-XX-7456
Phone Number	Email Address	Address	
(907) 209-8740	legal@lga.com	PO BOX 165 Anchor Point, AK 99556	

Product Details

Coverage Amount	Coverage Length	Waiver of Premium	Term Rider
\$100,000	30 Years	No	N/A
Child Rider	Application Submit		
N/A	N/A		

Applicant tasks

What applicants can do themselves

- Upload missing documents
- Complete and e-sign application
- View any outstanding requirements
- Update contact information before submission

How it works

New workflow

- Applicant receives portal link at application start
- Single centralized link — portal is the home for all updates
- Reminders prompt return to portal, not separate emails
- Once complete, application moves to next phase automatically

Frequently asked questions

Q: Can the applicant still call or email support?

A: Yes, support remains available, but the portal reduces the need.

Q: Will advisors have visibility?

A: Advisors still receive updates via traditional channels and can prompt clients to log in.

Q: What happens if the portal isn't accessed?

A: Applications will not be impacted. The Applicant Portal is simply to help provide transparency and ease of access during the application process.

Tips for advisors

- Encourage applicants to bookmark the portal
- Let clients know this simplifies the process
- Offer to walk them through it if needed – most find it intuitive

Note: Reach out to our team for a step-by-step guide

Questions?

Visit our Contact Directory to connect with your dedicated your team. From quick answers to in-depth training, we're here to support you.

Get connected