



## CLIENT SHOPPING CART E-APPLICATION GUIDE

☰ MEDICARE SUPPLEMENT -
+ NEW

Client/Label:	Zip	OMAHA, NE	Age	Gender	Tobacco	Plan	Effective Date	Sort By	
<input type="text" value=""/>	68124	Douglas	65	Female	Non-tobacco	G	2020-09-11	Price	<a href="#">Get Quote</a>

<b>\$102.06 /mo</b>	<b>Independence American Insurance Company</b>	
HH Discount: 7.0%	Parent: <b>Geneve Holdings Inc Grp</b> AM Best Rating: <b>A- (Outlook Stable)</b> Rate Type: <b>Attained age</b>	Plan: <b>G</b> S&P Rating: <b>n/a</b> Rating Class: <b>n/a</b>
Quote Options ▾		<a href="#">Apply Now!</a> <a href="#">Add To Cart</a> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">1</span>

<b>\$106.29 /mo</b>	<b>Continental Life Insurance Company Of Brentwood, Tennessee (Aetna)</b>	
HH Discount: 7.0% Policy Fee: \$20.00	Parent: <b>Aetna Grp</b> AM Best Rating: <b>A (Outlook Stable)</b> Rate Type: <b>Attained age</b>	Plan: <b>G</b> S&P Rating: <b>n/a</b> Rating Class: <b>n/a</b>
Quote Options ▾		<a href="#">Apply Now!</a> <a href="#">Add To Cart</a> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">2</span>

<b>\$106.79 /mo</b>	<b>Accendo Insurance Company (A CVS Company And Aetna Affiliate)</b>	
HH Discount: 14.0% Policy Fee: \$25.00	Parent: <b>Aetna Grp</b> AM Best Rating: <b>Stable (Outlook A)</b> Rate Type: <b>Attained age</b>	Plan: <b>G</b> S&P Rating: <b>na</b> Rating Class: <b>n/a</b>
Quote Options ▾		<a href="#">Apply Now!</a> <a href="#">Add To Cart</a> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">3</span>

<b>\$115.67 /mo</b>	<b>United World Life Insurance Company</b>	
HH Discount: 12.0%	Parent: <b>Mutual Of Omaha Grp</b> AM Best Rating: <b>A+ (Outlook Stable)</b> Rate Type: <b>Attained age</b>	Plan: <b>G</b> S&P Rating: <b>A+</b> Rating Class: <b>n/a</b>
Quote Options ▾		<a href="#">Apply Now!</a> <a href="#">Add To Cart</a> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">4</span>

**Gross Premium Cost**

Mo: **\$154.33**

[Start E-App](#)

CART (2)
✕

**Client / Applicant**

Sarah Wilson [✕ Remove](#)

**Medicare Supplement**

United World Life Ins Co
[Remove](#)

Plan G
Mo: **\$115.67**

**Dental**

United Natl Life Ins Co Of Amer
[Remove](#)

Dental And Vision Shield
Mo: **\$38.66**

**Benefit Level**

Shield Dental & Vision 1000 (\$1000)
▾

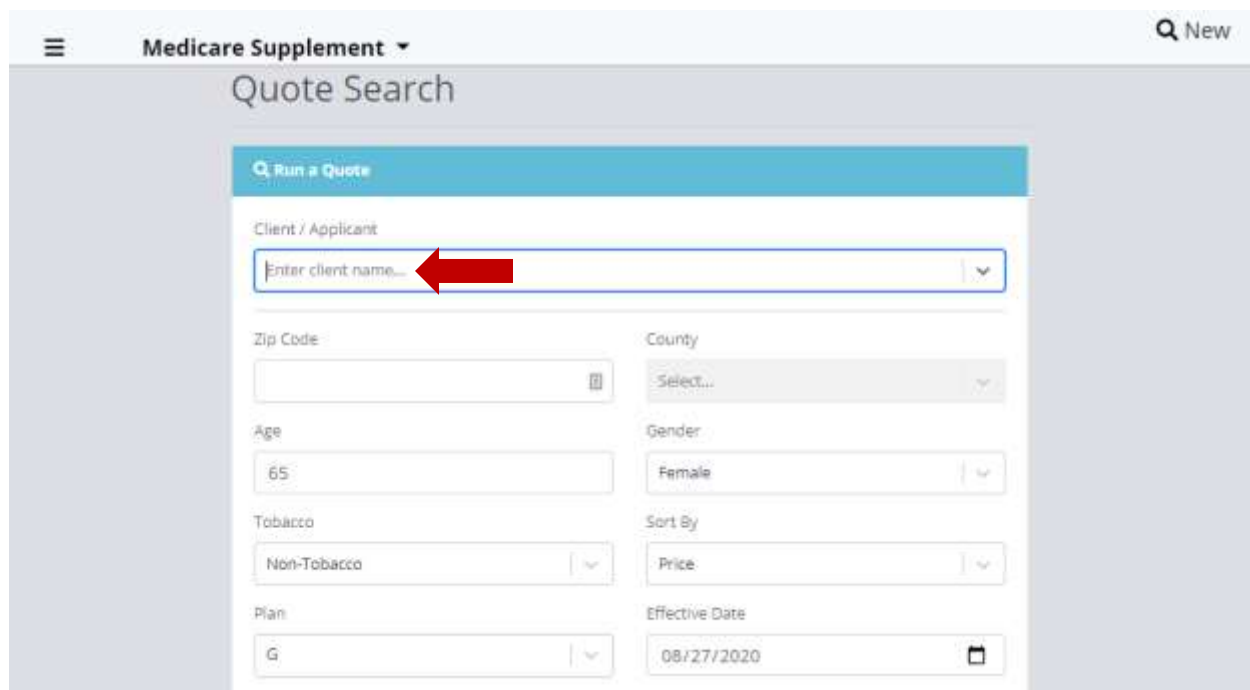
**Quote Search**

Search for quotes of the following products to include in the cart.

## Create a Client/Applicant

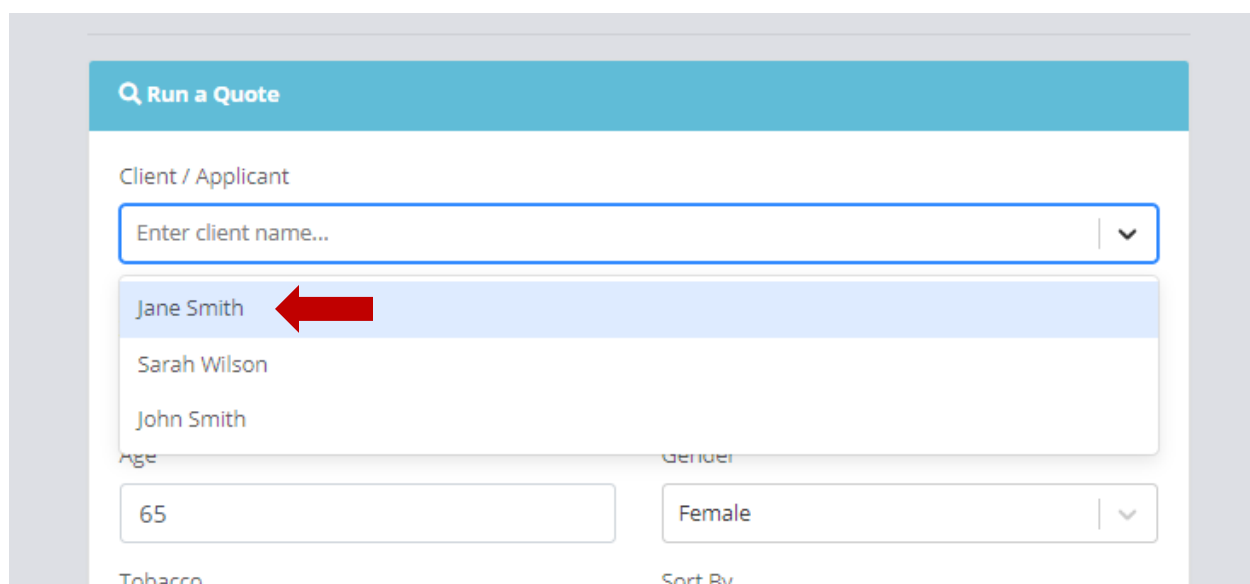
Enter a Client/Applicant name on the initial quote search screen. The system will automatically store the quote parameters for the individual.

An agent can by-pass the Client/Applicant section to run a quote; however, a Client/Applicant needs to be created to start a Shopping Cart.



The screenshot shows the 'Medicare Supplement' section of the 'Quote Search' interface. A 'Run a Quote' button is at the top. Below it, the 'Client / Applicant' dropdown menu is open, showing the text 'Enter client name...' with a red arrow pointing to it. Other fields include 'Zip Code', 'County' (dropdown), 'Age' (65), 'Gender' (Female), 'Tobacco' (Non-Tobacco), 'Sort By' (Price), 'Plan' (G), and 'Effective Date' (08/27/2020).

If a Client/Applicant was previously created, select the individual's name to run the quote for. The system will populate their saved quote parameters.



This screenshot shows the 'Client / Applicant' dropdown menu open, displaying a list of names: Jane Smith, Sarah Wilson, and John Smith. A red arrow points to 'Jane Smith'. The other fields (Age, Gender, Tobacco, Sort By, Plan, Effective Date) are visible below the dropdown.



Two new icons will appear on the quote results page:

1. Shopping Cart Icon
2. Add to Cart Button

To complete a single application, select **Apply Now**.

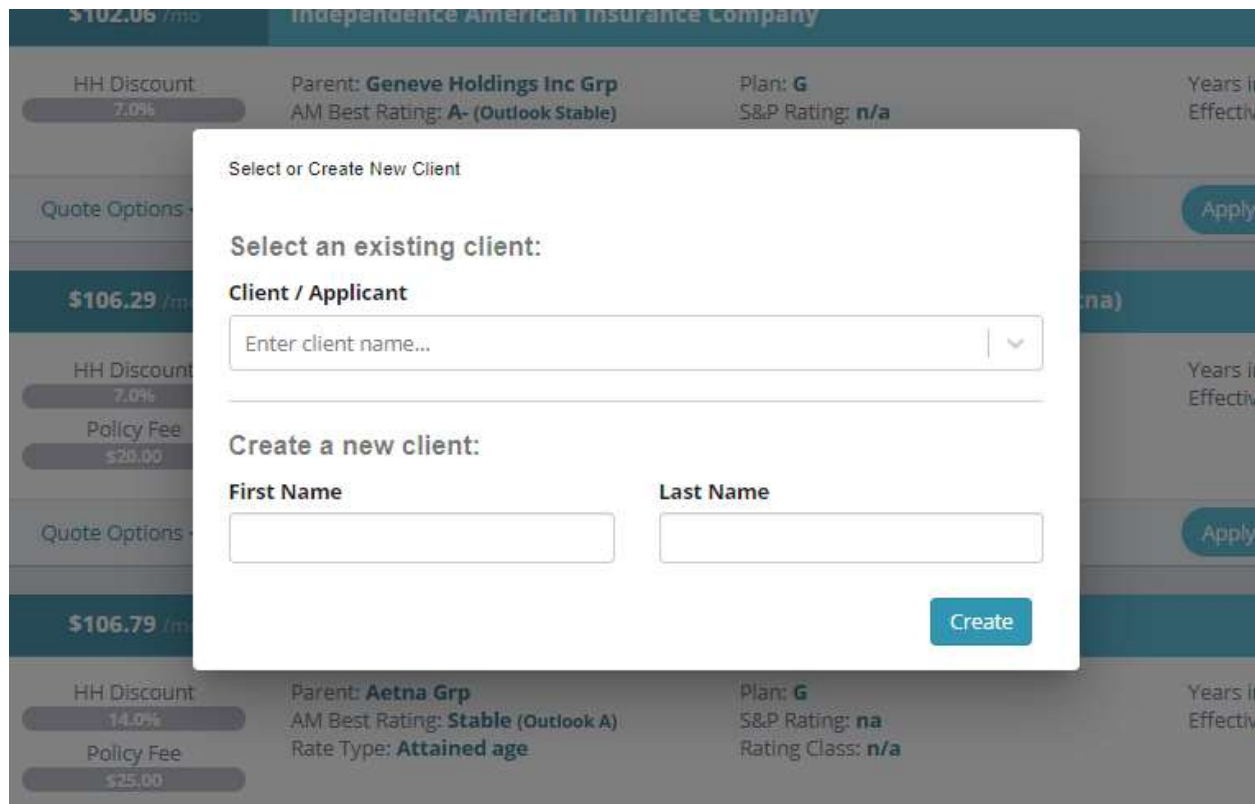
To complete multiple applications for a Client (Medicare Supplement and Dental) select **Add to Cart**.

The screenshot shows a web interface for Medicare Supplement quotes. At the top, there is a navigation bar with a menu icon, the text "MEDICARE SUPPLEMENT -", a "+ NEW" button, and a shopping cart icon. A red arrow points to the shopping cart icon. Below the navigation bar, there are three quote cards. Each card has a blue header with the price and the insurer's name. The first card is for Independence American Insurance Company with a price of \$102.06. The second card is for Continental Life Insurance Company of Brentwood, Tennessee (Aetna) with a price of \$106.29. The third card is for Accendo Insurance Company (A CVS Company And Aetna Affiliate) with a price of \$106.79. Each card contains details such as HH Discount, Parent, Plan, AM Best Rating, S&P Rating, Rating Class, Years in Market, and Effective Date. At the bottom of each card, there are "Quote Options" and two buttons: "Apply Now" and "Add to Cart". Red arrows point to the "Add to Cart" buttons on the first and second cards. A red arrow also points to the "Apply Now" button on the second card.

Price	Insurer	HH Discount	Parent	Plan	AM Best Rating	S&P Rating	Rating Class	Years in Market	Effective Date	Buttons
\$102.06	Independence American Insurance Company	7.0%	Geneve Holdings Inc Grp	G	A- (Outlook Stable)	n/a	n/a	1	06/08/2020	Apply Now, Add to Cart
\$106.29	Continental Life Insurance Company Of Brentwood, Tennessee (Aetna)	7.0%	Aetna Grp	G	A (Outlook Stable)	n/a	n/a	28	08/01/2020	Apply Now, Add to Cart
\$106.79	Accendo Insurance Company (A CVS Company And Aetna Affiliate)	14.2%	Aetna Grp	G	Stable (Outlook A)	na	n/a	n/a	03/13/2020	Apply Now, Add to Cart



A window will appear to **select an existing client** or **create a new client** if the Client/Applicant wasn't selected on the initial quote search screen.



A number icon will appear next to the shopping cart icon once a plan is added. The number will indicate how many plans are in the shopping cart. **Select the shopping cart icon to view items in cart.**





## Shopping Cart View

View client name, plans in cart and gross premium cost of all items in cart.

To add other product plans to the cart, select product under quote search. The system will automatically populate the client's quote parameters.

The screenshot shows a shopping cart for Medicare Supplement plans. The cart contains three items:

- Item 1:** Independence American Insurance Company. Gross Premium Cost: \$102.06. Details: Parent: Geneva Holdings Inc Grp, Plan: G, S&P Rating: n/a, Rating Class: n/a, Years in Market: 1, Effective Date: 06/06/2020. Rate Type: Attained age.
- Item 2:** Continental Life Insurance Company Of Brentwood, Tennessee (Aetna). Gross Premium Cost: \$106.29. Details: Parent: Aetna Grp, Plan: G, S&P Rating: n/a, Rating Class: n/a, Years in Market: 28, Effective Date: 08/01/2020. Rate Type: Attained age.
- Item 3:** Accendo Insurance Company (A CVS Company And Aetna Affiliate). Gross Premium Cost: \$106.79. Details: Parent: Aetna Grp, Plan: G, S&P Rating: n/a, Rating Class: n/a, Years in Market: n/a, Effective Date: 03/13/2020. Rate Type: Attained age.

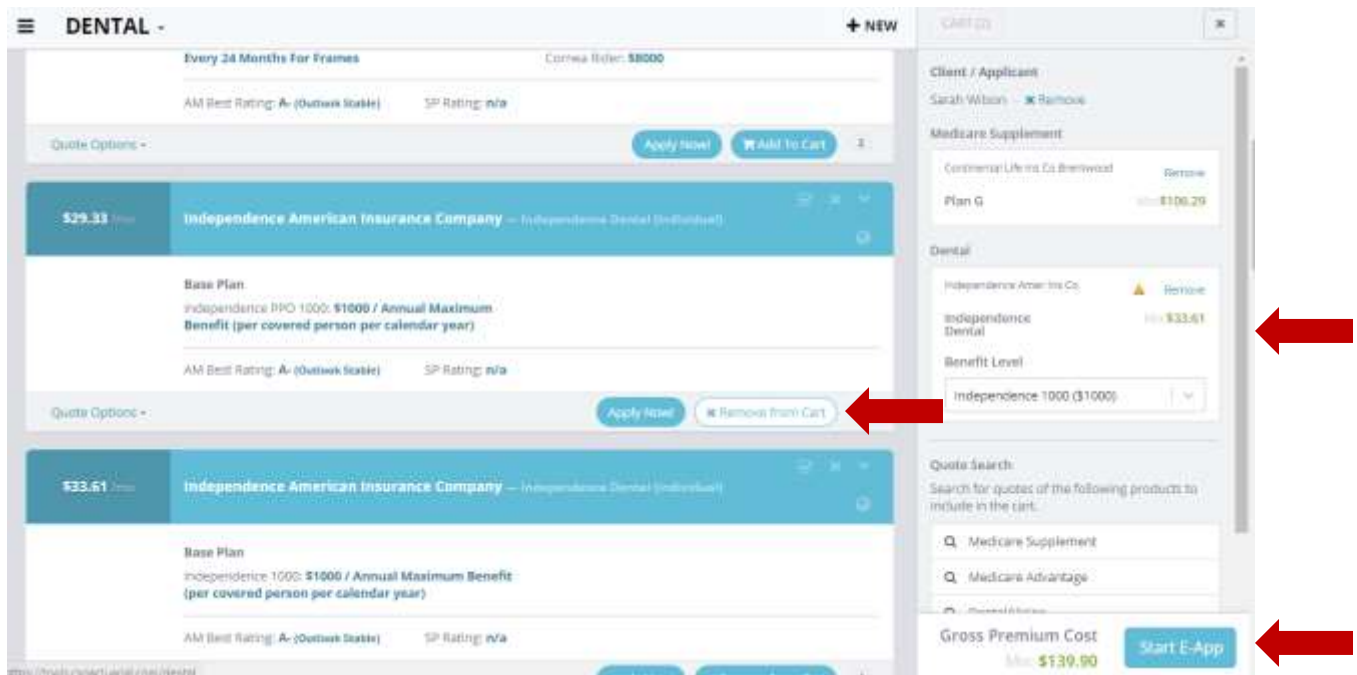
On the right side, there is a sidebar with the following sections:

- Client / Applicant:** Sarah Wilson (Remove)
- Medicare Supplement:** Continental Life Ins Co Brentwood (Remove), Plan G (\$106.29)
- Quote Search:** Search for quotes of the following products to include in the cart:
  - Medicare Supplement
  - Medicare Advantage
  - Dental/Vision (indicated by a red arrow)
  - Final Expense Life
  - Hospital Indemnity
- Gross Premium Cost:** \$106.29 (Start E-App)

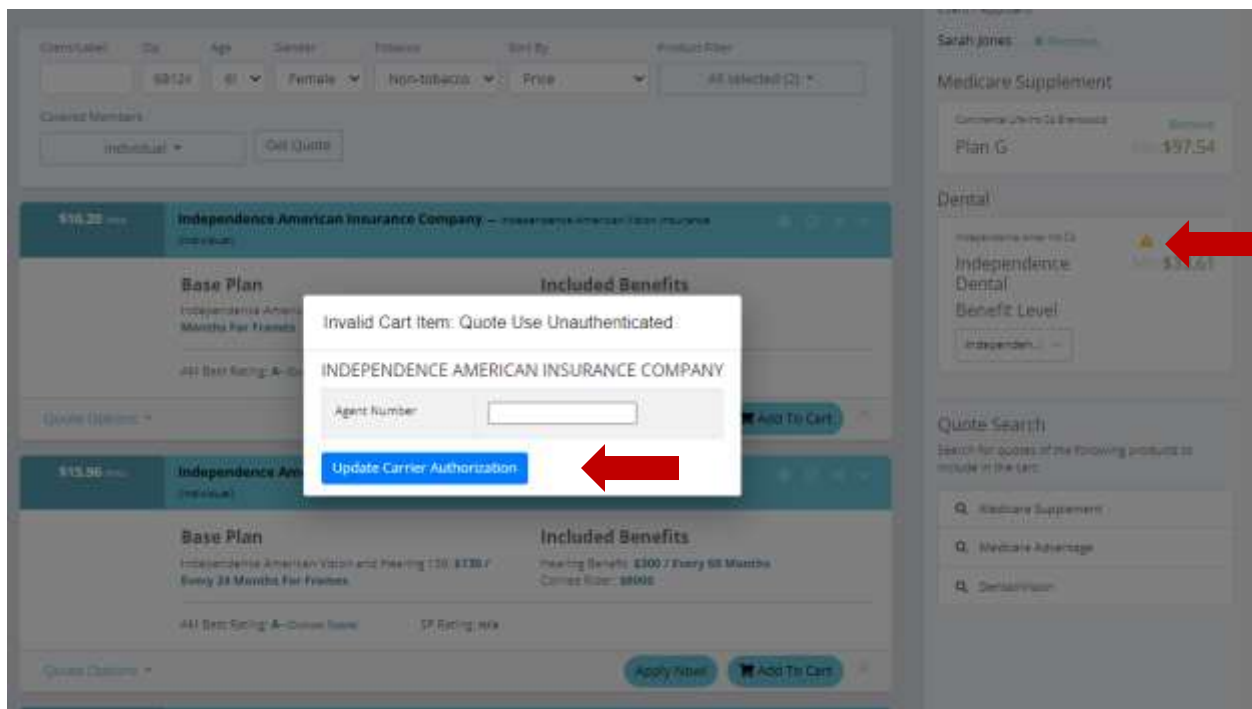
The screenshot shows the "Quote Search" interface for Dental plans. The search parameters are as follows:

- Run a Quote:** OMAHA, NE
- Client / Applicant:** Sarah Wilson
- Zip Code:** 68124
- Age:** 65
- Gender:** Female
- Tobacco:** Non-Tobacco
- Sort By:** Price
- Product Filter:** Dental, Vision
- Covered Members:** Individual

Add additional plans to the shopping cart and see the **gross premium cost update**.



An orange icon will appear next to the company name indicating the agent's Writing Number or National Producer Number is needed to validate the agent appointment. The system will automatically save it for future applications.





## Cart Checkout

Applications will appear in the order they were added to the cart. Applications can be completed in any order. Applicant information, such as name, phone number, email, address, date of birth, SSN, etc. will carry over into the next application to simplify and speed up the application process. Billing information and signature will have to be entered separately in each application.

Select **Start E-App** to start the first application.

Cart Checkout

Cart | 1. Medicare Supplement (Not Started) | 2. Dental (Not Started) | Finish

### Let's Begin the E-Application Process

You will now start answering questions to fill out and submit the application for the following quote:

Continental Life Ins Co Brentwood  
Plan G  
Mo: \$106.29

Cancel | Start E-App

**Complete the first application by answering the questions in each section.** Continue through the application and electronically sign.

Plan G (High Deductible) | Plan G (Selected) | Plan M | Plan N (High Deductible)

Requested Medicare Supplement effective date: 10/1/2020

MISE Initial

Residence Address: 123 W RD

ZIP: 60122

City: DMAHA | State: NE

Is mailing address different from residence address? No

Home Phone: (555) 555-5555 | Email Address: you@email.address

Age: 65 | Date of Birth: 8/1/1955

Gender: Female | Tobacco: False

Quote Summary: United World Life Insurance Company, Plan G, \$115.67 (MIS)

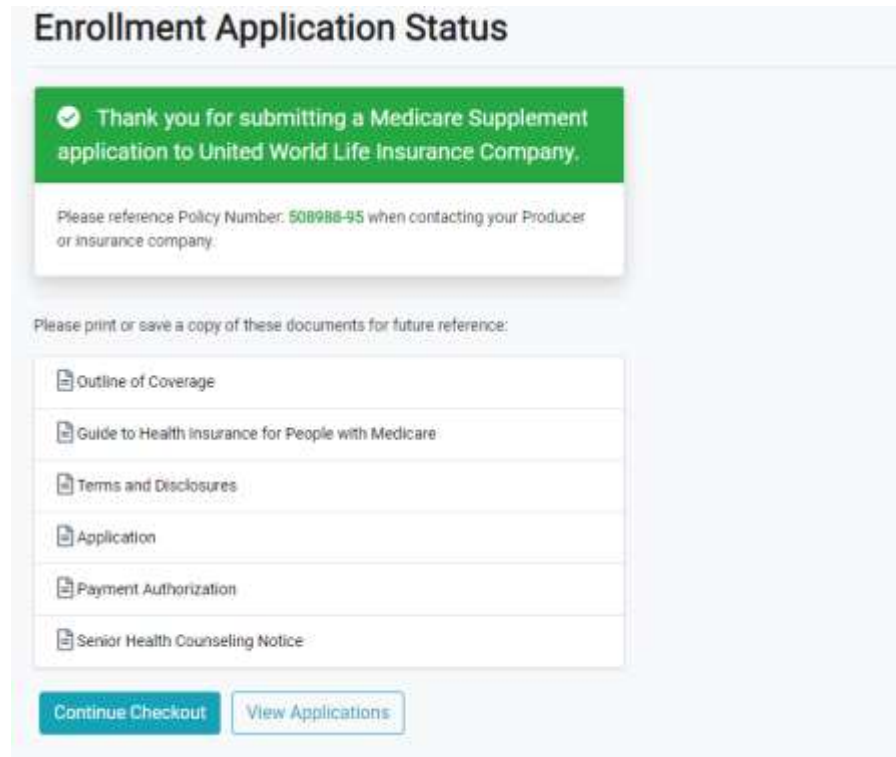
Sections to Complete: Select Underwriting Situation, Apply for Information, Household Premium Discount Information, Medicare Information, Previous or Existing Coverage Information, Method of Payment, To be Completed by Producer, Review and Lock Application, Signature



The individual's policy number and completed application documents will be provided once the first application is submitted.

Click on **Continue to Checkout** at the bottom of the page to go to the next application.

View Applications directs the agent to their application dashboard where submitted and incomplete applications are stored.



**Enrollment Application Status**

Thank you for submitting a Medicare Supplement application to United World Life Insurance Company.

Please reference Policy Number: 508988-95 when contacting your Producer or insurance company.

Please print or save a copy of these documents for future reference:

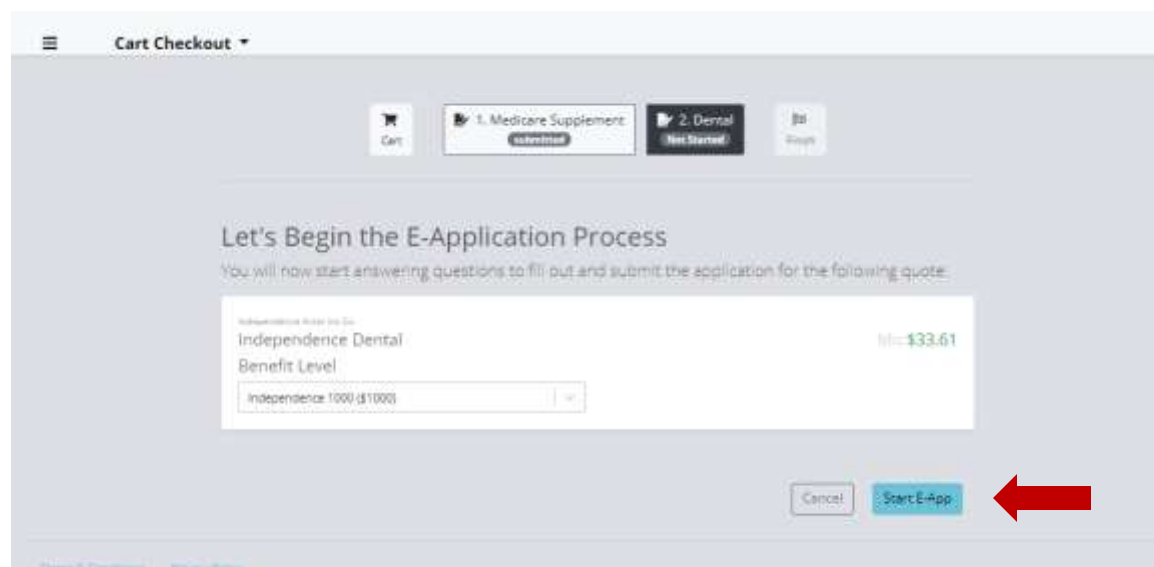
- Outline of Coverage
- Guide to Health Insurance for People with Medicare
- Terms and Disclosures
- Application
- Payment Authorization
- Senior Health Counseling Notice

**Continue Checkout** **View Applications**



The system will automatically prompt the agent to start the next application.

Select **Start E-App** to continue to the next application.



**Cart Checkout**

1. Medicare Supplement **Submitted** 2. Dental **Next Step**

Let's Begin the E-Application Process

You will now start answering questions to fill out and submit the application for the following quote:

Independence Dental **Rate: \$33.61**

Benefit Level: Independence 1000 (\$1000)

**Cancel** **Start E-App**







**Applicant Information from the first application carries over into the next application** but can be edited. The agent will continue to complete the application.

The screenshot shows a web application form for a dental insurance quote. The form includes fields for gender (Female selected), residence address (123 W Rd.), ZIP (68124), city (OMAHA), state (NE), home phone (555-555-5555), work phone (###-###-####), email (apatrick@csgactuarial.com), age (65), and date of birth (8/1/1955). A sidebar on the right displays the quote from Independence American Insurance Company for Independence Dental at \$33.61/month. Below the quote is a list of sections: Consent (checked), Applicant Information (highlighted), Dependent Information, Previous or Existing Coverage Information, Method of Payment, Acknowledgment and Authorization, and Review and Lock Application. Navigation buttons for 'Previous' and 'Continue' are visible at the bottom of the form.

The individual's policy number and completed application documents will be provided once the first application is submitted.

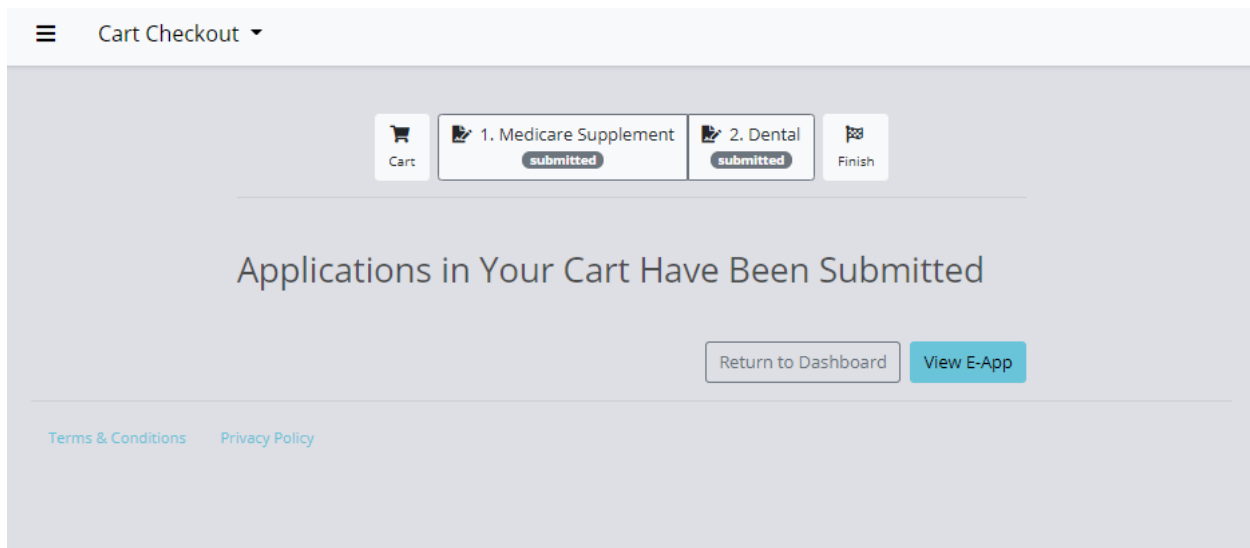
Click on **View Applications** to see all submitted applications or click on **Continue to Checkout** if any applications remain.

The screenshot shows the 'Enrollment Application Status' page. A green notification box states: 'Thank you for submitting a Dental application to Independence American Insurance Company'. Below this, it says: 'Please reference policy number 58-894612 when contacting your producer or Insurance Company.' Underneath, there is a section titled 'Please print or save a copy of these documents for future reference:' with two document links: 'Terms and Disclosures' and 'Guide to Health Insurance for People with Medicare'. At the bottom, there are two buttons: 'Continue Checkout' and 'View Applications'. A red arrow points to the 'View Applications' button.

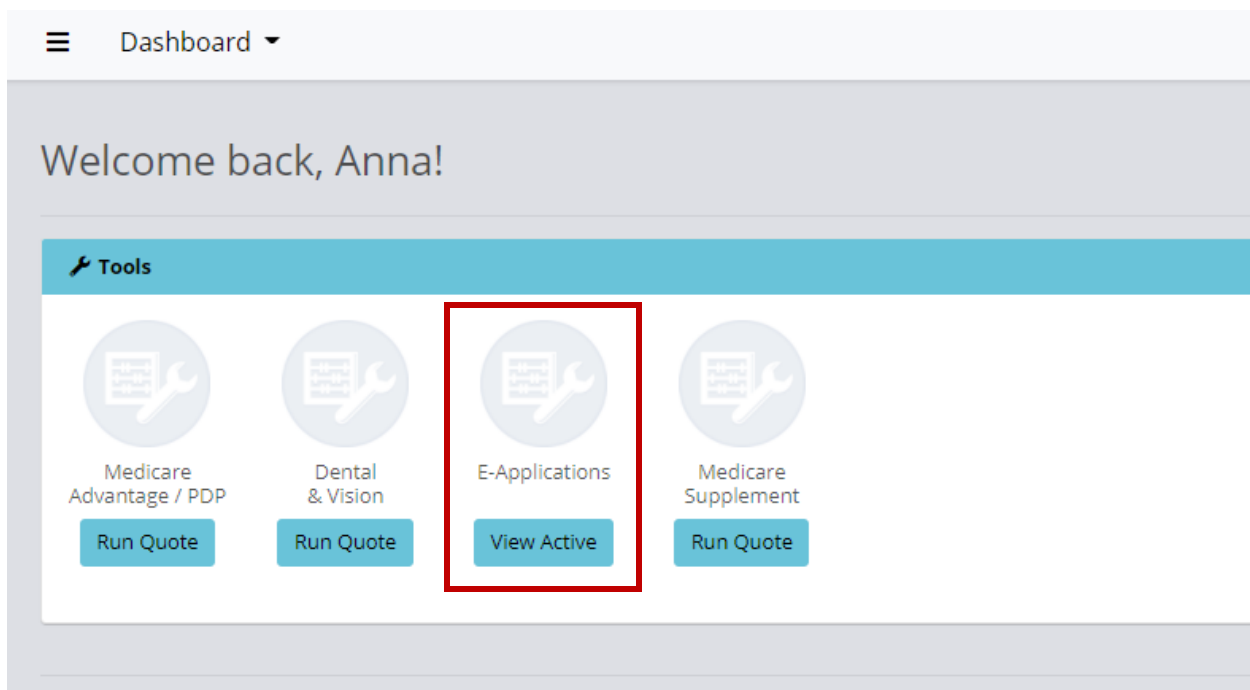


If **Continue to Checkout** is selected, a message will appear the application in the cart have been submitted.

View the submitted Dental E-App by selecting **View E-App** or select **Return to Dashboard** to continue quoting.



All submitted applications automatically store in the **E-Application** Section on the **Dashboard**.





Completed applications store for 30-60 days depending on the carrier. To check when the application has been issued, visit the Carrier's Agent Portal.

## Applications

Search for existing applications by first *and* last name. Edit or remove incomplete applications.

Applicant - First Name:  Applicant - Last Name:

[Search](#)

1-15 of 40 [>](#) [>>](#)

Summary	Applicant	Status	Created Date	Last Modified	
Independence Amer Ins Co Dental Insurance, NE	Sarah Gcsg	<span>Submitted</span>	09/10/2020	09/10/2020	<a href="#">View</a>
United World Life Ins Co Medicare Supplement, NE Plan - G	Sarah Gcsg	<span>Submitted</span> Policy# 511227-95	09/10/2020	09/10/2020	<a href="#">View</a> <a href="#">↻</a>