



Senior Market Tools Suite E-APPLICATION GUIDE



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Getting Started

Account Access

- An agent will need their own account (username) to access the e-app.
- Agency Portals with auto-logins will have to create individual accounts for their agents to access the e-app platform.

Password Requirements

- When accessing the e-app platform for the first time, an agent will have to reset their password to meet the new password requirements.
- New Password Requirements:
 - o 7 characters minimum
 - o One letter
 - One number
 - One special character (! @ # \$)
- An agent will have 6 attempts to enter their current password. After 6 failed attempts, the account will be locked for 30 minutes.
- To reset a password, the agent can click on "Forgot Password?" on the sign-in page. The agent will then receive an email with a link to reset their password.
- A Portal Admin can send an agent a link to reset their password through the Portal Admin Page. <u>A Portal</u> Admin cannot change a password for an agent.

Producer Number – Contracting Requirements

- An agent must be contracted with the carrier to submit an application.
- The first time an agent enters the e-app platform for a carrier, they will be required to enter their producer number for the carrier. The system will automatically validate their producer number and save it for future applications for the carrier.
- If the agent's producer number cannot be validated, the agent must contact their upline or carrier.
- If the agent is contracted with the carrier, but not appointed in a particular state with the carrier, carriers/states that allow just-in-time appointments will allow the agent to submit an application.
- An agent can change their producer number for a carrier in the Settings portion of the Admin Panel. See Application Panel overview for further details.

HIPAA Requirements

• Several measures are in place to ensure the electronic application platform meets HIPAA requirements.

Contact Information

- An agent may contact CSG Actuarial if they are experiencing technical difficulties using the platform.
- Any questions regarding information entered on the application, underwriting, policy information, plan benefits, approved or denied applications or obtaining copies of applications and forms, must be directed to an agent's upline or the carrier.





Quote Rate vs Application Rate

• Several factors can change the rate on the application from the rate on the quoting tool, such as height/weight requirements, application date and requested effective date, and Open Enrollment/Guarantee Issue state-specific rules.

Applicant Billing

• An applicant's bank information is not validated by the e-app. Invalid bank information could result in an application being denied. Contact the carrier to make adjustments.

Policy Submission

- The application will undergo final review and approval by the carrier before the policy is approved/effective. The carrier has the right to decline coverage even though it was successfully submitted.
- The system will inform the agent of a possible decline due to a health condition or drug prescription but will still submit the application.
- Reference the submitted policy number when contacting the carrier about a submitted application.

Saving an Application

- The system will auto-save the application as information is being entered.
- Incomplete applications are stored in the Application Panel for 60 days. This may vary by carrier.
- Submitted policy numbers with an applicant's name and summary of application will be stored in the Application Panel for 90 days. This may vary by carrier.
- During the application process, the agent/applicant has two opportunities to save/print a copy of the application and forms before the applicant e-signs and immediately after the applicant e-signs. The platform does not store copies of submitted applications/forms. The agent/applicant will need to contact the carrier.

Editing an Application

- Incomplete applications are stored in the Application Panel for 60 days. This may vary by carrier.
- If an agent needs to edit the application after the applicant has agreed to the terms and conditions and gave consent, the application can be edited, however the applicant will have to give consent again.

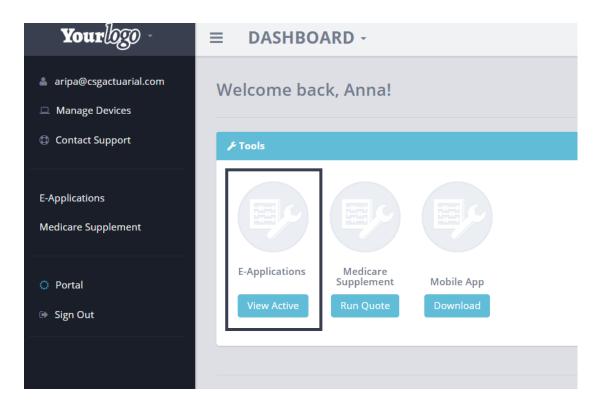
500 Error

• A 500 error may occur if the session has timed out. If this happens, refresh the page or sign out and sign back in.



Application Panel

Within the Application Panel, an agent can view their complete and incomplete applications and change their producer numbers if needed. To access the Application Panel, select **View Active** under **E-Applications** in Tools.



■ E-Applications					
Applications earch for existing applications	by first <i>and</i> last name. Edit or remo	ove incomplete ap	plications.		
pplicant - First Name Q. Search	Applicant - Last Name				
Summary	Please note: Applications will expire Applicant	Status	Created Date	Last Modified	
Continental Life Ins Co Brentwood Medicare Supplement, IL Plan - N	Sixtyone Hbkxyphjhsnrgmy	Submitted Policy# CLI3300325	12/13/2018	12/13/2018	🖹 View
Continental Life Ins Co Brentwood Medicare Supplement, IL Plan - N	Sixtythree Usauijvjgixkbie	Submitted Policy# CLI3300324	12/13/2018	12/13/2018	🖹 View
Continental Life Ins Co Brentwood Medicare Supplement, IL Plan - N	Sixtyfour Smhqgmqqfedxknq	Submitted Policy# CLI3300323	12/13/2018	12/13/2018	View 🗈



Change Producer Number

1. Click on Settings Icon in the upper right corner of the Application Panel.

pplications					
earch for existing applications	by first <i>and</i> last name. Edit or rem	ove incomplete ap	plications.		
oplicant - First Name	Applicant - Last Name				
Q Search					
	Please note: Applications will expire	after a predetermined a	mount of time.		
Summary	Applicant	Status	Created Date	Last Modified	
Continental Life Ins Co Brentwood Medicare Supplement, IL Plan - N	Sixtyone Hbkxyphjhsnrgmy	Submitted Policy# CLI3300325	12/13/2018	12/13/2018	🖹 View
Continental Life Ins Co Brentwood	Sixtythree Usauijvjgixkbie	Submitted	12/13/2018	12/13/2018	🖹 View
Medicare Supplement, IL Plan - N					

2. Select the Carrier you would like to change the producer number for.

American Continental Insurance Company (Aetna)

AETNA HEALTH AND LIFE INSURANCE COMPANY

AETNA HEALTH INSURANCE COMPANY

Continental Life Insurance Company of Brentwood, Tennessee (Aetna)

Applications Settings		
Carrier Appointments You may edit your appointment details here by choosing the desire time per carrier. To become appointed with a carrier, please contact		ppointment settings are automatically added who
UNITED WORLD LIFE INSURANCE COMPANY	→	
Omaha Insurance Company	÷	
UNITED OF OMAHA LIFE INSURANCE COMPANY	÷	
MUTUAL OF OMAHA INSURANCE COMPANY	÷	

→

→

→

→

- 3. Enter your producer number.
- 4. Click Submit.

Settings Producer Appointment Validation
Please submit the following information to validate your appointment status with the carrier.
Producer Number
123456
Submit



Access E-Application Platform

- 1. Run a normal Medicare Supplement quote.
- 2. Within the quote result page, an **Apply Now** button will appear for carriers on the platform.

\$134.75 /mo	United World Life Insurance	Company	
HH Discount 12.0%	Parent: Mutual Of Omaha Grp AM Best Rating: A+ (Outlook Stable)	Plan: F S&P Rating: A+ Rate Type: Attained age	Years in Market: 14 Effective Date: 02/22/2018 Rating Class: n/a
Plan Details 🕄			Apply Now! 🖪 🕕

3. The first time an agent accesses the E-App for a carrier, they will be prompt to enter their Producer Number. The system will remember their producer number for future applications.

Settings

Submit

Producer Appointment Validation

Please submit the following information to validate your appointment status with the carrier.

Writing Num	nber		
Submit			
Sublint			

4. If an invalid producer number is entered, the system will notify the agent the producer number is not valid.

Current user failed to authenticated with the Car	rier.
ettings	
Producer Appointment V	alidation
	n to validate your appointment status with the carrier.
/riting Number	
1234567	



5. The agent will begin the application process by selecting the Underwriting Type. The agent will proceed through the application.

	OVERVIEW NOTIFICA	
Applications Select Underwriting Situation	Plan F Full Underwriting	surance Company (Aetna)
Underwriting Agent	\$124.12/mo	A
Underwinding agent	Gender	Female
Name Writing Number	Quoted Age Tobacco	65 False
Insurance Agent 78845512	Initial	Documents
	Sections	
	Select Underwriting Situ	ation
Dual Enrollment	Applicant effortuation	
Are you applying at the same time as another Medicare eligible adult, who is either (a) your spouse; or (b) someone with whom you are in a civil union partnership; or (c)someone with whom you have continuously resided for the past 12 months?	mushing frankers (h	and thereafter
Yes No	Industry character	
Underwriting Type	Particular Solding Co.	ange discustor
Please select the applicant's underwriting situation, which will be validated as the application is completed: *	contract of figures 4	
Full Underwriting Open Enrollment Guaranteed Issue	To the Completion Sty. No.	11.11.1
Granarie o issue	Name and oth Apple	
	Capacity of Capaci	a
Continue >		



Errors with Underwriting Situation & Effective Date

Based upon the Underwriting Situation selected – Open Enrollment, Guarantee Issue or Full Underwriting – and the information provided in the application sections - Applicant Information, Medicare Information and Previous or Existing Coverage Information – the system will notify the agent if the underwriting type is not valid and can be changed or if the application cannot be submitted due to information provided.

The underwriting logic is provided by the carrier. If the agent disagrees with the underwriting situation or believes the application can be submitted as is, the agent will need to contact the carrier for clarification.

Example of Underwriting Error: Guarantee Issue not valid

- 1. Agent selects Guarantee Issue.
- 2. After completing the next sections of the application, a red box appears notifying the agent that the GI Situation is not valid.
- 3. For a detailed explanation, the agent can click on **View all notifications** or select the **Notifications** tab at the top of the application.

■ E-Applications		•	OVERVIEW NOTIFICAT		
Applications		Î	Quote		
Applicant Information	aetna Gonti Issurace Ao Adra	ental Company	American Continental Ins Plan N Guaranteed Issue \$82.30/mo	surance Company (A	Aetna)
💋 Please Complete the Follow	ing		Applicant Details	A	
			Gender	Female	
an (select one) *			Quoted Age	68	
Plan A Plan B			Tobacco	False	
Plan F Plan F - High Deductible			Initial Do	ocuments	
Plan G Plan N		5	Sections		
equested Medicare Supplement effective date:	First Name *		Select Underwriting Situa	ation	0
12 • / 17 • / 2018 •	Jane		Applicant Information		
iddle Initial	Last Name *		Household Premium Dise	count Information	\oslash
	Smith		Medicare Information		\oslash
esidence Address *			Guaranteed Issue		\oslash
4 Arlington Ct			众 Notification		3
lb *			The GI Situation is not va	lid	
25301 -		_			
Previous	Cor	tinue 🔿	View all notifications		



	٠	OVERVIEW	NOTIFICATIONS 2	×
Applications Applicant Information	American Continental Insurance Company	Notification The GI S	ons ituation is not valid	
Please Complete the Following		View	You are not eligible for Gua Issue. Based on the informa have entered, you are curre for Full Underwriting. Please your underwriting situation Select Underwriting Situatio	ition you ntly eligible e change on the
Plan (select one) *				

- 4. The agent is informed the applicant is eligible for Full Underwriting.
- 5. To change the underwriting situation to Full Underwriting, click on **View** in the Notifications tab or **Select Underwriting Situation** in the Overview tab.

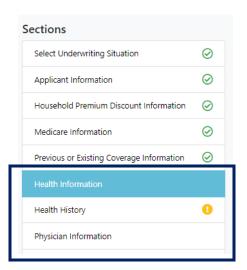
■ E-Applications		۵	OVERVIEW	NOTIFICATIONS 2	>
Applications			Quote		
Applications Applicant Information	ı	aetna American Continental Insurational An Alter Company	Plan N Guaranteed Iss		oany (Aetna)
			\$82.30	/mo	
Please Complete the Following	ing		Gender	plicant Details	A
			Quoted Ag		
Plan (select one) *			Tobacco	False	
Plan F Plan F Plan F Plan F Plan F Plan G				Initial Documents	
 Plan N 			Sections		
Requested Medicare Supplement effective date:	First Name *		Select Unde	rwriting Situation	0
× 12 ▼/ 17 ▼/ 2018 ▼	Jane		Applicant Ir	formation	
Middle Initial	Last Name *		Household	Premium Discount Informa	ation 🥝
	Smith		Medicare In	formation	\odot
Residence Address *			Guaranteed	Issue	\odot
4 Arlington Ct			Previous or	Existing Coverage Informa	tion 🥝



- 6. Change Underwriting type to Full Underwriting.
- 7. Click Continue.

Appleations Select Underwriting Situation Underwriting Agent Underwriting Agent Underwriting Agent Underwriting Agent Underwriting Agent Name Writing Number Insurance Agent 78845512 America Continential Insurance Company (Aetho) Insurance Agent 78845512 America Continential Insurance Insuran	≡	E-Applications	٠	OVERVIE	W NOTIFICATIONS	S 2	×
Image: Construction of the same time as another Medicare eligible adult, who is either (a) your spouse: or (b) someone with whom you are in a civil union partnership: or (c) someone with whom you have continuously resided for the past 12 months: Select Underwriting Situation Household Premium Discount Information Guaranteed Issue Medicare Information Cuaranteed Issue Method of Payment Method of Payment To be Completed by Producer Review and Lock Application 			aetna Continental Insurance Company	Plan N Guarante	ed Issue	nce Company (Aetna)	
Underwriting Agent Image: Writing Number Insurance Agent Region (Specified) Insurance Agent 78845512			An Aetha Company		Applicant Details	А	
Underwriting Agent Tobacco False Image: Insurance Agent Writing Number Initial Documents Insurance Agent 78845512 Initial Documents Select Underwriting Situation Applicant Information Initial Documents Are you applying at the same time as another Medicare eligible adult, who is either (a) your spouse; or (b) someone with whom you are in a civil union partnership; or (c) someone with whom you have continuously resided for the past 12 months? Imitial Documents Imitial Documents Imitial Documents				Gende	r	Female	
Image: Insurance Agent Writing Number Insurance Agent 78845512 Initial Documents Select Underwriting Situation Applicant Information Image: Insurance Agent Ye you applying at the same time as another Medicare eligible adult, who is either (a) your spouse; or (b) someone with whom you are in a civil union partnership; or (c) someone with whom you have continuously resided for the past 12 months? Image: Insurance Agent Image: Imag				Quoteo	d Age		
Name vvrtrig vurnee Insurance Agent 78845512 Sections Select Underwriting Situation Applicant Information Applicant Information Insurance Agent Select Underwriting Situation Insurance Agent Select Underwriting Coverage Information Insurance Agent Select Underwriting Situation, which will be validated as the application is completed: Insurance Agent Full Underwriting Full Underwriting Situation, which will be validated as the application is completed by Producer To be Completed by Producer Review and Lock Application Review and Lock Application		onderwinding Agent		Tobaco	0	False	
Instruction Agent Select Underwriting Situation Are you applying at the same time as another Medicare eligible adult, who is either (a) your spouse; or (b) someone with whom you are in a civil underwriting situation partnership; or (c) someone with whom you have continuously resided for the past 12 months? Medicare Information Image: Control of the past 12 months? • Ves No Previous or Existing Coverage Information Image: Control of the past 12 months? • Ves No Method of Payment Image: Completed by Producer Image: Completed by Producer • Full Underwriting • Full Underwriting • Completed by Producer Image: Completed by Producer Image: Completed by Producer • Full Underwriting • Completed by Producer Image: Completed		Name Writing Number			Initial Docum	nents	
Applicant Information Applicant Information Or you applying at the same time as another Medicare eligible adult, who is either (a) your spouse; or (b) someone with whom you are in a civil union partnership; or (c) someone with whom you have continuously resided for the past 12 months? • Yes • Ne • Ne Duderwriting Type • Full Underwriting • Pull Underwriting • Spen Enrollment • Summedel Issue Review and Lock Application		Insurance Agent 78845512		Section	s		
Dual Enrollment Are you applying at the same time as another Medicare eligible adult, who is either (a) your spouse; or (b) someone with whom you are in a civil union partnership; or (c)someone with whom you have continuously resided for the past 12 months? • Yes • No Duderwriting Type Please select the applicant's underwriting situation, which will be validated as the application is completed: * • Full Underwriting • Cupen Enrollment • Guaranteed Issue • Cupen Enrollment • Sugaranteed Issue				Select L	Inderwriting Situation		
Dual Enrollment Are you applying at the same time as another Medicare eligible adult, who is either (a) your spouse; or (b) someone with whom you are in a civil union partnership; or (c)someone with whom you have continuously resided for the past 12 months? Medicare Information Image: Control of the past 12 months? Yes No Previous or Existing Coverage Information Image: Control of the past 12 months? Please select the applicant's underwriting situation, which will be validated as the application is completed:* Method of Payment Image: Control of the past 12 months? Full Underwriting Image: Control of the past 12 months? Please select the applicant's underwriting situation, which will be validated as the application is completed:* Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months? Image: Control of the past 12 months?				Applica	nt Information	${}^{\oslash}$	
Are you applying at the same time as another Medicare eligible adult, who is either (a) your spouse; or (b) someone with whom you are in a civil union partnership; or (c)someone with whom you have continuously resided for the past 12 months? • Yes • No Underwriting Type Please select the applicant's underwriting situation, which will be validated as the application is completed: * • Full Underwriting • Open Enrollment • Guaranteed Issue	Du	al Enrollment		Househ	old Premium Discount	t Information	
continuously resided for the past 12 months? Guaranteed Issue Image: Continuously resided for the past 12 months? Yes No Previous or Existing Coverage Information Image: Coverage Information Image: Coverage Information Underwriting Type Please select the applicant's underwriting situation, which will be validated as the application is completed: * Method of Payment Image: Coverage Information Image: Coverage Information Image: Full Underwriting Image: Coverage Information Image: Coverage Information Image: Coverage Information Image: Coverage Information Image: Coverage Information	Are y	ou applying at the same time as another Medicare eligible adult, who is (Medica	re Information	\oslash	
No Previous or Existing Coverage Information Previous or Existing Coverage Information Previous or Existing Coverage Information Method of Payment Please select the applicant's underwriting situation, which will be validated as the application is completed: Full Underwriting Open Enrollment Guaranteed Issue			with whom you have	Guarant	teed Issue	\odot	
Please select the applicant's underwriting situation, which will be validated as the application is completed:* To be Completed by Producer • Full Underwriting • Open Enrollment • Guaranteed Issue Review and Lock Application				Previou	s or Existing Coverage	Information 📀	
completed:* Io be Completed by Producer • Full Underwriting • Open Enrollment • Guaranteed Issue Review and Lock Application	Un	derwriting Type		Method	of Payment	\odot	
Open Enrollment Guaranteed Issue			he application is	To be C	ompleted by Producer	r 🕕	
				Review	and Lock Application		
	O G	uaranteed Issue		Signatu	re	A	

8. **Health Information, Medication Information** and any additional underwriting tasks will be added to the task sections. These sections will need to be completed before the application is submitted.





Example of Underwriting Error: Open Enrollment not valid

- 1. Agent selects **Open Enrollment**
- 2. After entering the applicant's **date of birth and age**, the agent is notified the applicant is not eligible for insurance.
- 3. This carrier/state does not allow submission for under age 64.5.

Age *	Date of Birth *	Castions	
64 🔻	10 • / 18 • / 1954 •	Sections	•
Gender *	Height Feet and inches *	Select Underwriting Situation	•
Female	5' 5" 🔻	Applicant Information	
Weight *		Household Premium Discount Information	\odot
165 lbs 🔻		Medicare Information	\oslash
Are you a legal resident of the United States? *		Previous or Existing Coverage Information	\odot
YesNo		Health Information	
Have you used any form of tobacco, an electronic of past 12 months? *	igarette (e-cig) or other nicotine product in the	수 Notification	×
No	Continue ->	Not Eligible for Insurance - Cannot Submit Ap	op.
		View all notifications	



Example of Effective Date Error: Application cannot be submitted as is

- 1. After completing the Applicant Information section of the application, the agent is notified the application cannot be taken because of the effective date selected.
- 2. The application is considered **Incomplete** and cannot be submitted.

■ E-Applications		۰	OVERVIEW NOTIFIC	ATIONS 🚹	×
Applications Applicant Information		d pany	Quote American Continental I Plan N Open Enrollment \$82.30/mo	nsurance Company (A	.etna)
Please Complete the Follow	ing		Applicant Details	A Female	
			Gender Quoted Age	68	
Plan (select one) *			Tobacco	False	
 Plan B Plan F Plan F - High Deductible Plan G Plan N 			Initial D	Documents	
Requested Medicare Supplement effective date:	First Name *		Select Underwriting Sit	uation	\odot
2 • 25 • 2019 •	Jane		Applicant Information		
Middle Initial	Last Name *		Household Premium D	iscount Information	\odot
	Smith		Medicare Information		\odot
Residence Address *			♠ Notification		×
4 Arlington Ct					
ZIP *			Your Requested Effectiv more than 6 months aff effective date		
25301 ▼ ← Previous	Conti	nue >	View all notificatio	ns	

Applicant Information

🕜 Edit Section

Question	Response
Plan (select one)	Plan N
Requested Medicare Supplement effective date:	2019-02-25
First Name	Jane
Middle Initial	None
Last Name	Smith
Residence Address	4 Arlington Ct



- 3. To change the effective date, go to the **Applicant Information** section on the task bar and **adjust the effective date** to match carrier requirements.
- 4. Click Continue.
- 5. Continue completing the application.

Requested Medicare Supplement effective date:	First Name * Jane
12 V 17 V 2018 V Middle Initial	Last Name *
	Smith
Residence Address *	
4 Arlington Ct	
← Previous	Continue →



Uploading Supporting Documents

An agent can upload supporting documents to the e-application, such as a Notice of Termination or Evidence of Insurance, in the **To be Completed by Producer** section.

- 1. Identify the Document Type.
- 2. Select Choose File and locate the file on the computer.
- 3. Once the file name appears, click Upload.
- 4. When the screen shows Upload Complete, click Add Document.

Producer Phone *	Producer E-Mail Address *	Sections	
(555) 555 - 5555	Agent@producer.com	Select Underwriting Situation	\oslash
		Applicant Information	\odot
Upload any materials relevant to this application Document Type *	Upload File *	Household Premium Discount Information	\odot
Notice of Termination	Choose File INDV_ID.pdf	Medicare Information	\odot
	Upload	Previous or Existing Coverage Information	\odot
		Health Information	\odot
(no entrie	is listed)	Health History	\odot
Add Document		Physician Information	\odot
		Method of Payment	\odot
Are you requesting to split commissions *		To be Completed by Producer	-
 No 		Review and Lock Application	
← Previous	Verify Application	Signature	

5. The document is now attached to the e-application and labeled Notice of Termination.

Upload any materials relevant to this application Document Type *	Upload File * Choose File No file chosen Upload
Notice of Termination	Remove
Add Document	



E-Signature Process

An applicant has options to sign an application:

- 1. Applicant Provides Identifying Information Applicant present
- 2. Email Signature Link Applicant not present
- 3. Voice Signature Varies by carrier
- 4. Touch screen Varies by carrier

Process for Applicant Provides Identifying Information

- 1. Select Yes in same physical location as client
- 2. Select Applicant Provides Identifying Information
- 3. Open and review all documents
- 4. Check I have received, read and kept a copy of documents





Process for Applicant Provides Identifying Information

- 5. Enter Applicant's Mother's Maiden Name and Last Four of SSN
- 6. Check Apply E-Signature
- 7. Verify Producer Name and Number
- 8. Check Apply Signature
- 9. Click Sign Application

Applicant Signature

By entering my personal identifying information below, I agree to apply my electronic signature to the Application, Payment Authorization and Health Information Authorization. My signature is subject to the agreement section of each form.

Mother's Maiden Name	Last Four of SSN
Smith	1234
I acknowledge that I am signing in:	
City	State West Virginia 🔻
CHARLESTON	
Zip	
25301	
By clicking "Apply E-Signature" I agree to apply my electronic sign	ature to the application
☑ Apply E-Signature	
Producer - Statement of Signature	
Producer Signature	
I certify that I have interviewed the proposed applicant and have a the applicant:	ccurately recorded in the application the information supplied by
Producer's Name	Producer Number 1
John Doe	78845512
By clicking "Apply E-Signature" I agree to apply my electronic sign	ature to the application.
Apply E-Signature	
← Edit Application	Print for Signature Sign Application



10. A submitted confirmation message will appear with the applicant's policy number. A copy of the application and forms are available.

View E-Applications Enrollment Application Status
The portal which you are currently logged into is a designated testing portal. Your application was not submitted to Aetna Insurance Companies. Please reference Policy Number: ACI3300247 Thank you for testing.
Please print or save a copy of these documents for future reference:
Terms and Disclosures and e-Signature Consent
Outline of Coverage
Guide to Health Insurance for People with Medicare
Application
Payment Authorization
Health Information Authorization
Return to Dashboard

11. The Application will show as Submitted in the Application Panel. The applicant's name and summary of plan will be stored in the Admin Panel for 90 Days. This may vary by carrier. **The Application will still undergo further review by the carrier before the policy is issued.**

		inty to toodeat			
Applications Search for existing applications by firs	t <i>and</i> last name. Edit or remov	e incomplete ap	plications.		
Applicant - First Name	Applicant - Last Name				
	Please note: Applications will expire aft	er a predetermined a	mount of time.		
Summary App	olicant	Status	Created Date	Last Modified	
American Continental Ins Co Medicare Supplement, WV Plan - N	Jane Smith	Submitted Policy# ACI3300247	12/17/2018	12/17/2018	🕻 View



Process for Email Signature Link

- 1. Select NO for are you in same location as client
- 2. Select Email Signature Link
- 3. Confirm the applicant's email shown. To change the email, Click Edit Application at the bottom of the page and return to Applicant Information section of the application.
- 4. Verify Producer Name and Number
- 5. Check I have received, read and kept a copy of documents
- 6. Click Sign Application

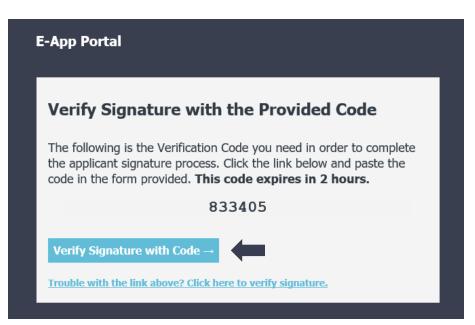
Applications		Quote	
Statement of Signature	aetna American Instantionat Astantican	al Ipany	Company (Aetna)
Jane Smith - Statement of Signature		\$92.30 /mo	
Are you in the same physical location as your client?	Select the signature type	Applicant Details	A
Ves No	 Applicant Provides Identifying Information Email Signature Link 	Gender	Female
Annulisent Cimetan		Quoted Age	68
Applicant Signature By pressing "Sign Application" I agree to verify the appli address:	cant's signature through e-mail with the following e-mail	Tobacco	n/a
apatrick@csgactuarial.com		Initial Documen	ts
Producer - Statement of Signature		Sections	
Producer Signature			
I certify that I have interviewed the proposed applicant a information supplied by the applicant:	and have accurately recorded in the application the	Applicant relationships	
Producer's Name	Producer Number 🕕	Incation framum Descut of	
John Doe	78845512	real and related	
		fuentier to a	
By clicking "Apply E-Signature" I agree to apply my elec	tronic signature to the application.	Parity of Soling Company	
✓ Apply E-Signature		restrict of features.	
		To be Completed by Producer	
		Review and Lock Application	\oslash
		Signature	
← Edit Application	🕒 Print for Signature 🛛 🗣 Sign Applicat	ion	



7. A message will appear that the application is **now pending**. Once the applicant reviews and electronically signs, the application will be automatically submitted to the carrier.

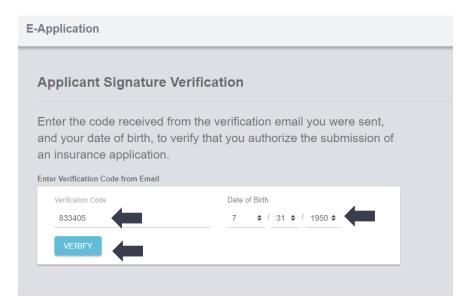
View E-Applications Enrollment Application Status
This application is now pending the applicant's signature. Once the applicant reviews and electronically signs, the application will be automatically submitted to the carrier.
Please print or save a copy of these documents for future reference:
Terms and Disclosures and e-Signature Consent
Cutline of Coverage
Guide to Health Insurance for People with Medicare
Application
Payment Authorization
Health Information Authorization
Return to Dashboard

8. The applicant will receive the following email with a verification code. The applicant will click **Verify Signature with Code.**





9. The link will take the applicant to the following page for signature verification. The applicant will enter their **Verification Code** from the email and their **Date of Birth**, then click **Verify**.



10. The applicant will review the Term and Conditions of the Electronic Signature and click I Agree.

begin the signature process, please read the Terms and iditions and Electronic Signature Consent and indicate below ether you agree to their terms.
s and Conditions and Electronic Signature Consent
TERMS AND CONDITIONS OF USE
By using this Web site, owned by CSG Actuatial, LLC, in relation to an application for insurance, you indicate your understanding of the following Terms and Conditions of Use ("Terms") and you utther agree to accept such Terms and to be legally bound by them without limitation or qualification. Please read these Terms carefully before using this Web site. If you do not agree with these Terms, you are not granted permission to use this Web site. If you do not agree with these Terms, you are not granted permission to use this Web site. If you do not agree with these Terms, you are not granted permission to use this Web site and must exit this site mmediately. CSG Actuarial, LLC may revise these Terms at any time by updating this posting. You are bound by any such revisions and should therefore periodically visit this page to review the hen current Terms.
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- 11. The Applicant will open and review forms for accuracy
- 12. Check I have received, read and kept a copy of the above documents
- 13. The Applicant will enter their City to apply electronic signature
- 14. Check Apply E-signature
- 15. Click on Sign Application

Application										
Statement of Signature	•									
Required Documents										
Please open and review and for accuracy:	the following forms in their entirety									
Outline of Coverage										
Guide to Health Insurance for Peo	So Guide to Health Insurance for People with Medicare									
Application										
Payment Authorization										
☑ I have received, read, and kept a cop Applicant Signature	y of the above documents.									
	to the Application and Payment Authorization. My ction of each form.									
I acknowledge that I am signing in:										
City	State									
	DELAWARE -									
By clicking "Apply E-Signature" I agree to a	apply my electronic signature to the application.									





16. The confirmation message will appear with the applicant's **Policy Number**. **The Application will still undergo further review by the carrier before the policy is issued.**

Please refe	Continental Insurance Company. ence Policy Number: ACI3300248 when contacting your insurance company.	
	copy of these documents for future reference: ssures and e-Signature Consent	
Outline of Cover	age	
Guide to Health	nsurance for People with Medicare	

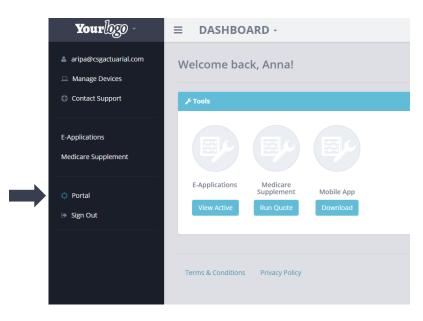
17. Once the applicant completes the E-signature Verification, the application status will change to **Submitted** in the Application Panel and be submitted to the carrier for final review.

Applications Search for existing application	ns by first <i>and</i> last name. Edit o	r remove incomplete ap	plications.		
Applicant - First Name	Applicant - Last Na	me			
	Please note: Applications wi	Il expire after a predetermined a	mount of time.		
Summary	Applicant	Status	Created Date	Last Modified	
American Continental Ins Co Medicare Supplement, WV Plan - N	Jane Smith	Submitted Policy# ACI3300247	12/17/2018	12/17/2018	🖁 View



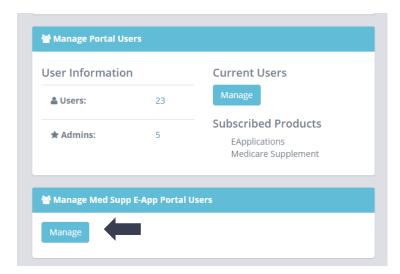
Admin Panel

Portal users with Admin access can manage E-App users and run E-App usage reports. To access the Admin Panel, click on **Portal** on the left side bar.



Manage E-App Users

1. Click on Manage under Mange Med Supp E-App Portal Users.





- 2. Find the agent you want to provide access to.
- 3. Under Companies, select the companies you want to provide access to.
- 4. Click Save.

ljambor@csgactuarial.com	Lauren Jambor	Companies 2 selec	Save
lmills@csgactuarial.com	Luke Mills	 ✓ United ✓ World Life Ins Co ✓ Aetna Hlth & Life Ins Co 	Save
shumlicek@csgactuarial.com	Scott Humlicek	 Omaha Ins Co Mutual Of Omaha Ins 	Save

Run E-App Usage Reports

There are two ways to run usage reports – by individual user or within a select time period.

1. For Individual Usage, click Search Usage in the upper right corner.

I E-Application Usage Report	Search Usage Q
Producer submission data will be exported to a .CSV for emailed to aripa@csgactuarial.com within the hour.	matted file and
Start Date	
yyyy-mm-dd	
End Date	
yyyy-mm-dd	
Get Report	



- 2. Enter Agent's email and start and end dates.
- 3. Click Search Usage.
- 4. A list of all submitted apps will appear.

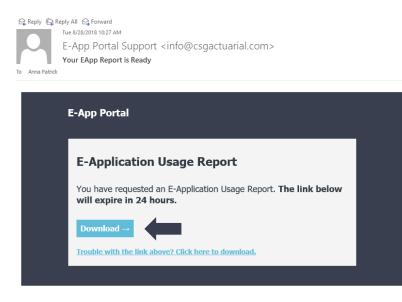
lser Email	Start Date	End Date
aripa@csgactuarial.com	06/01/2018	08/01/2018
Search Usage Q		
mail Address	Medicare Supplemen	

- 5. To run a full report on usage within a time frame, select the start and end dates.
- 6. Click Get Report.
- 7. The report will be emailed to the email address listed.

II E-Application Usage Report	Search Usage Q
Producer submission data will be exported to a .CSV for emailed to aripa@csgactuarial.com within the hour. Start Date	matted file and
yyyy-mm-dd	
End Date	
yyyy-mm-dd	
Get Report	



8. Below is an example of the email you will receive. Click **Download.**



9. The report will include the following fields:

A	A18 • : $\times \checkmark f_{x}$													
	А	В	с	D	E	F	G	н	1	J	к	L	м	N
1	agent_fname	agent_Iname	email_address	submitted	naic	policy_number	age	gender	plan	tobacco	zip5	city	state	hhd
2														
2														