



Applicant Updates

Banner ExpressComplete Screens

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Start a quote...

State: * **Date of Birth:** * * * **Save Age**

Gender: Male Female **Smoker/Tobacco:** Yes No

Rate Class: * **Type of Insurance:** * **Face Amount: \$** *

Carrier: **Product Name:**

Hide Non-Preferred Carriers **Sort Quotes By:**

Quick Quote

Fill in the information above to start your ExpressComplete

1. Complete the data fields on the **Quote Screen**

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Start a quote...

State: Massachusetts * **Date of Birth:** January * 1 * 1978 * **Save Age**

Gender: Male Female **Smoker/Tobacco:** Yes No

Rate Class: Preferred * **Type of Insurance:** 10 Year Level Term * **Face Amount:** \$ 333,000

Carrier: Banner Life Insur * **Product Name:** --Select--

Hide Non-Preferred Carriers **Sort Quotes By:** Annual

Quick Quote

	Carrier	Annual	Monthly	Product Name	Rate Class	<input type="button" value="Request Carrier Appointment"/>	<input type="button" value="Quotes"/>
<input type="checkbox"/>	Preferred						
<input type="checkbox"/>	 Legal & General	\$286.43	\$24.35	OPTerm 10 - 10 Year Term	Preferred Non-Tobacco	<input type="button" value="Ticket ▶"/>	
<input type="checkbox"/>	Standard Plus						
<input type="checkbox"/>	 Legal & General	\$373.15	\$31.72	OPTerm 10 - 10 Year Term	Standard Plus Non-Tobacco	<input type="button" value="Ticket ▶"/>	
<input type="checkbox"/>	Standard						
<input type="checkbox"/>	 Legal & General	\$425.75	\$36.19	OPTerm 10 - 10 Year Term	Standard Non-Tobacco	<input type="button" value="Ticket ▶"/>	

- The quotes are returned from CompuLife and the user is able to **Select a Ticket**

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1 Personal information

Proposed Insured

Please complete the highlighted information and select **Next Steps** to move to the next section.

Product	Face Amount	Rate Class	Annual Premium
OPTerm 15 - 15 Year Term	\$150,000	Preferred Plus Non-Tobacco	\$118.05

Proposed Insured

Name:

Date of Birth: 01/01/1992

Gender: Male

Address:

City: CA

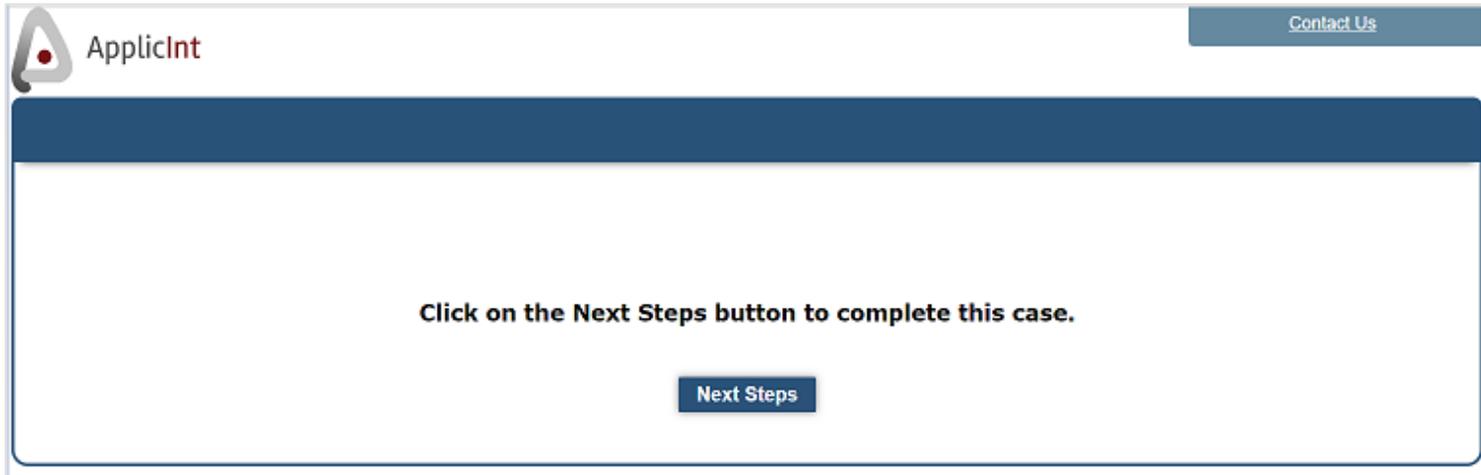
Agent #: Agent not contracted yet

[Preview XML](#) [Preview Ticket](#) **Next Steps**

3. Once the Ticket button is selected, the user opens the **Ticket Interview** page – all required data must be entered.

- Click on the **Next Steps** button at the top or bottom, the JSON file is sent from ExpressComplete to the Banner API and the URL for accessing the case is activated
- This URL has **5 minutes** to be accessed before it times out. **Do not stop here.**

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4. When the user clicks the **Next Steps** button on the ticket interview, the JSON file is sent to Banner and the case is created.
 - a. Applicant then displays the **Landing Page** with the following button to access the Banner API
 - b. Click the **Next Steps** button to move to drop the ticket.

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Legal & General

Application Information

Advisor Information

Class Information

Product Information

Advisor Information

Continue Application

Your Policy

About You

Health History

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: PC70000

GA Name: POLICYGENIUS INC

Communication Email: No email on file

Please enter the below information for each advisor.

Primary Advisor Code: [input]

NPN: [input]

SSN/TID: [input]

First Name: [input]

Last Name: [input]

Split %: [input]

I am not contracted

[+ Add Advisor](#)

Case Notification (Optional)

Email Address: [input]

[Next](#)

[Need Help?](#)

- The case will open in the Banner API. You will now see the following interface that begins with the **Advisor Information** fields.

Note: All data entered previously will prefill. Additional information can be added.

- If needed, users will enter the agent/advisor code/ssn/name and split. *Note: Users can add additional agents here by clicking the **+Add Advisor***
- If the agent information is complete and transferred over, users can skip this page.
- Select **Next** to continue

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Legal & General

Application Information

- Advisor Information
- Client Information**
- Product Information
- Advisor Attestation
- Continue Application

Your Policy

About You

Health History

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
Tester Middle Name (optional) test

Gender Male Date of Birth 12/11/1992 Last 4 digits of SSN 1234

Address
13414 Tangier Place

City Pawcatuck State Arizona Zipcode 20853

Email Address cmizelle@lgamerica.com Confirm Email Address cmizelle@lgamerica.com

Phone Number 301-000-1212 Mobile Confirm Phone Number 301-000-1212

[Next](#)

[Need Help?](#)

6. Complete the **client information**

Note: All data entered previously will prefill. Additional information can be added.

- Users will need to add the Proposed Insured email address and primary phone number.
- Select **Next** to continue

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The screenshot displays the 'Product Information' screen within the Banner Express Complete application. The interface includes a sidebar on the left with navigation options: 'Application Information' (expanded), 'Advisor Information', 'Client Information', 'Product Information' (selected), 'Advisor Attestation', and 'Continue Application'. Below these are 'Your Policy', 'About You', and 'Health History'. The main content area is titled 'Product Information' and contains the following fields:

- Product:** 10 Years
- Purpose of Insurance:** Personal
- Coverage Amount:** \$ 100,000
- Underwriting Class:** Preferred Plus
- Table Rating:** --Select--
- Billing Frequency:** Monthly

Below these fields are three input boxes for 'Term Riders' labeled '10 years', '15 years', and '20 years', each with a '\$' symbol. Under 'Child Rider', there are radio buttons for '\$5,000', '\$10,000', and 'Not Interested' (selected). Under 'Waiver of Premium', there are radio buttons for 'Add Coverage' and 'Not Interested' (selected). Under 'Temporary Insurance Coverage', there are radio buttons for 'Add Coverage' and 'Not Interested' (selected). At the bottom right, the 'Premium Amount' is displayed as \$8.39. A blue 'Next >' button is located at the bottom center. A 'Cancel' button is in the top right corner. A 'Need Help?' link is in the bottom left corner.

7. Complete the **product information**

Note: All data entered previously will prefill.

- a. Select **Next** to continue onto the **Advisor Attestation**

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Legal & General

Cancel

Application Information

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

Your Policy

About You

Health History

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?

8. If all the information has been entered appropriately, users are directed to the **Advisor Attestation** page.

Note: If any information is missing, the system will redirect the user to the fields still requiring completion.

- To adjust any **Application Information** utilize the left panel and navigate accordingly.
- To continue, select **I Agree** to accept the Advisor Attestation (This is just like the paper Agent Report.)

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9. Decide whether or not to **Drop a Ticket** or **Continue Application** with the client.

- a. For **Drop a Ticket**, follow steps 10 – 11
- b. For **Continue Application**, skip to step 12

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Application for Tester Test!

You can complete the application by selecting "Drop a Ticket" to send to the

Schedule Confirmation

You can send the application to your client by selecting "Send to Client" and an email with link to the application will be sent to your client. Alternatively you can also schedule with one of our interviewers by selecting a date and time below.

Morning Afternoon Evening View All

Times are scheduled in the customer's timezone.

August 2 - August 7

MON	TUE	WED	THU	FRI	SAT
02	03	04	05	06	07
		08:30 AM	08:30 AM	08:30 AM	08:30 AM
		09:00 AM	09:00 AM	09:00 AM	09:00 AM
		09:30 AM	09:30 AM	09:30 AM	09:30 AM
		10:00 AM	10:00 AM	10:00 AM	10:00 AM
		10:30 AM	10:30 AM	10:30 AM	10:30 AM

Date Time EDT

Schedule Send to Client Cancel

a.

10. After selecting **Drop a Ticket**, users have the option to **schedule a phone interview** or **send a link** to the customer to complete online.

- To schedule a phone interview, select the date and time then click on **Schedule**.
- If the user opted to **Send a Link**, they will receive a confirmation dialogue confirming the link was sent. Select **Close** to complete.



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

b.

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Schedule Confirmation

Sammy Test will be scheduled to complete their application on **August 6, 2021 at 09:00 AM CDT**. One of our interviewers will call Sammy at 870-378-0395.

A notification will be sent with their confirmation details. If they have any questions or concerns about the application, they can call 1-855-914-9115 Monday through Friday 9 AM to 10 PM.

a.





Your interview has been scheduled!

Your changes have been saved and a time has been scheduled for your client to complete their application over the phone. Your client will receive an email with the appointment details.

b.

11. To ensure the phone interview is scheduled appropriately, the interface prompts users with two confirmation dialogues.

- a. Select **Confirm** to schedule
- b. Select **Close** to complete

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Application Information

- ✓ Advisor Information
- ✓ Client Information
- ✓ Product Information
- ✓ Advisor Attestation
- ✓ Continue Application

Your Policy

About You

Health History

We could not verify your client's identity. Please review the information entered to make sure it's correct.

Client Information

Tester test is interested in **\$100,000.00** of coverage for **10 years** at **\$8.39** /month.
[View quote details](#)

Name
Tester Middle Name (optional) test

Gender Male Date of Birth 12/11/1992

Address
13414 Tangier Place
Address Line 2 (optional)
Pawcatuck Arizona 20853

Last 4 digits of SSN 1234 Email Address cmizelle@igamerica.com

Phone Number 301-000-1212 Mobile Secondary Phone Number Home

[Next](#)

12. After selecting, **Continue Application** users will be directed to the first page of the application to complete **Client Information**.

- Ensure all information is completed fully and without error.
- Continue through the application.
- If users elect to complete the health sections, they must send T&C's to the customer to sign off on.

For more information contact:

Christine Mizelle

Associate Product Owner

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