



ApplicInt Updates

Banner ExpressComplete Screens

Applicant Updates: Banner ExpressComplete Screens



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

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--

Reset

☐ Hide Non-Preferred Carriers

Sort Quotes By:

Annual


Quote ▶

Quick Quote

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

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Contact Us

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

First

MI

Last

Suffix

Date of Birth

01/01/1992

Gender

Male

Address

Street

City

CA

Zip Code

Agent #

☐ Agent not contracted yet

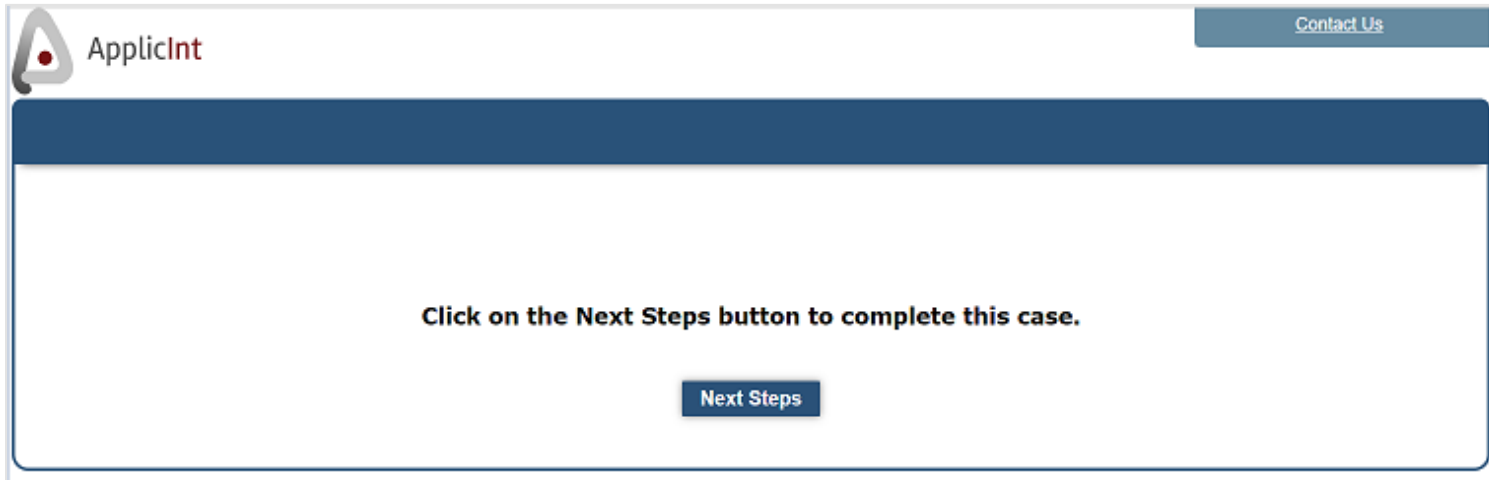
Preview XML

Preview Ticket

Next Steps

3. Once the Ticket button is selected, the user opens the **Ticket Interview** page – all required data must be entered.
- a. 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
 - b. 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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5. 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 Date of Birth Last 4 digits of SSN

Male 12/11/1992 1234

Address

13414 Tangier Place

City State Zipcode

Pawcatuck Arizona 20853

Email Address Confirm Email Address

cmizelle@lgamerica.com cmizelle@lgamerica.com

Phone Number Confirm Phone Number

301-000-1212 Mobile 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 Legal & General Banner ExpressComplete application. The interface includes a sidebar on the left with navigation links: 'Application Information', 'Advisor Information', 'Client Information', 'Product Information' (highlighted), 'Advisor Attestation', and 'Continue Application'. Below these are links for 'Your Policy', 'About You', and 'Health History'. The main form area contains the following fields:

- Product:** A dropdown menu set to '10 Years'.
- Purpose of Insurance:** A dropdown menu set to 'Personal'.
- Coverage Amount:** A text input field containing '\$ 100,000'.
- Underwriting Class:** A dropdown menu set to 'Preferred Plus'.
- Table Rating:** A dropdown menu set to '-Select-'.
- Billing Frequency:** A dropdown menu set to 'Monthly'.
- Term Riders:** Three input fields for '10 years', '15 years', and '20 years', each preceded by a '\$' symbol.
- Child Rider:** Three radio buttons: '\$5,000', '\$10,000', and 'Not Interested' (which is selected).
- Waiver of Premium:** Two radio buttons: 'Add Coverage' and 'Not Interested' (which is selected).
- Temporary Insurance Coverage:** Two radio buttons: 'Add Coverage' and 'Not Interested' (which is selected).

At the bottom right of the form, the 'Premium Amount' is displayed as '\$8.39'. A blue 'Next' button with a right-pointing arrow is located at the bottom center of the form. A 'Cancel' button is visible in the top right corner of the application window. A 'Need Help?' link is located at the bottom left of the form area.

7. Complete the **product information**

Note: All data entered previously will prefill.

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

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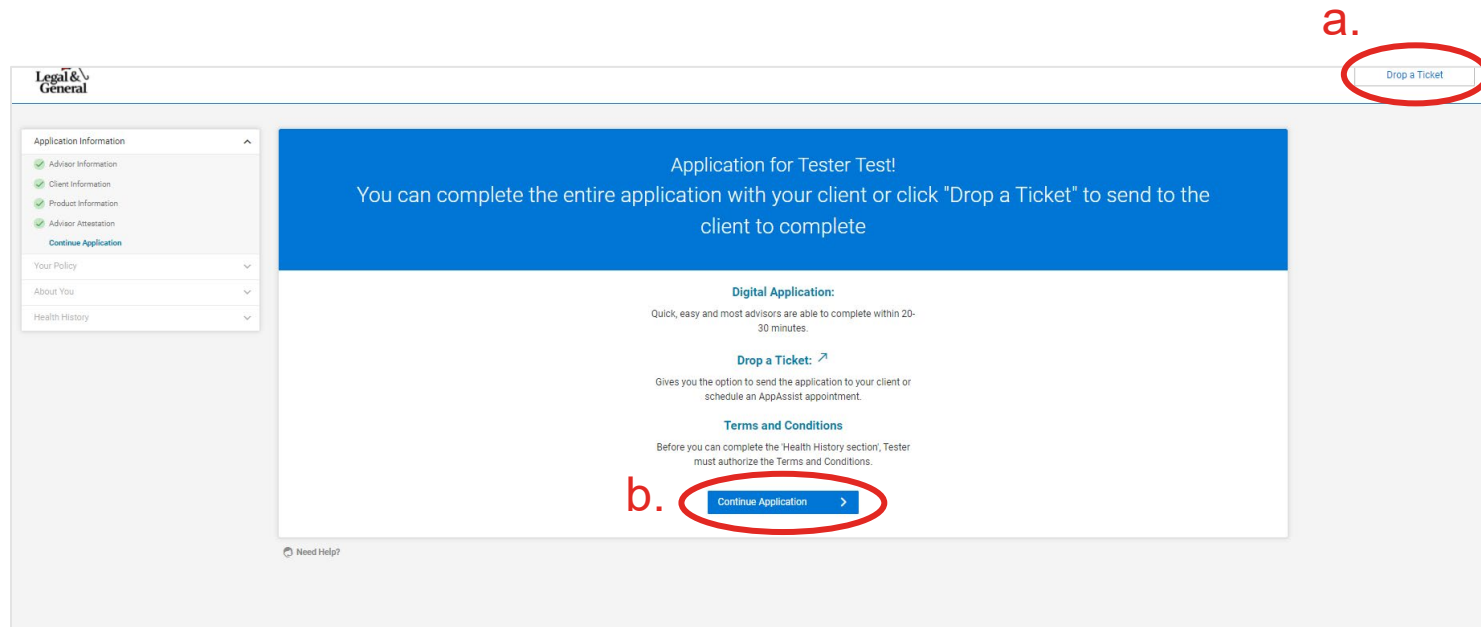
8. If all the information has been entered appropriately, users are directed to the **Advisor Attestation** page.

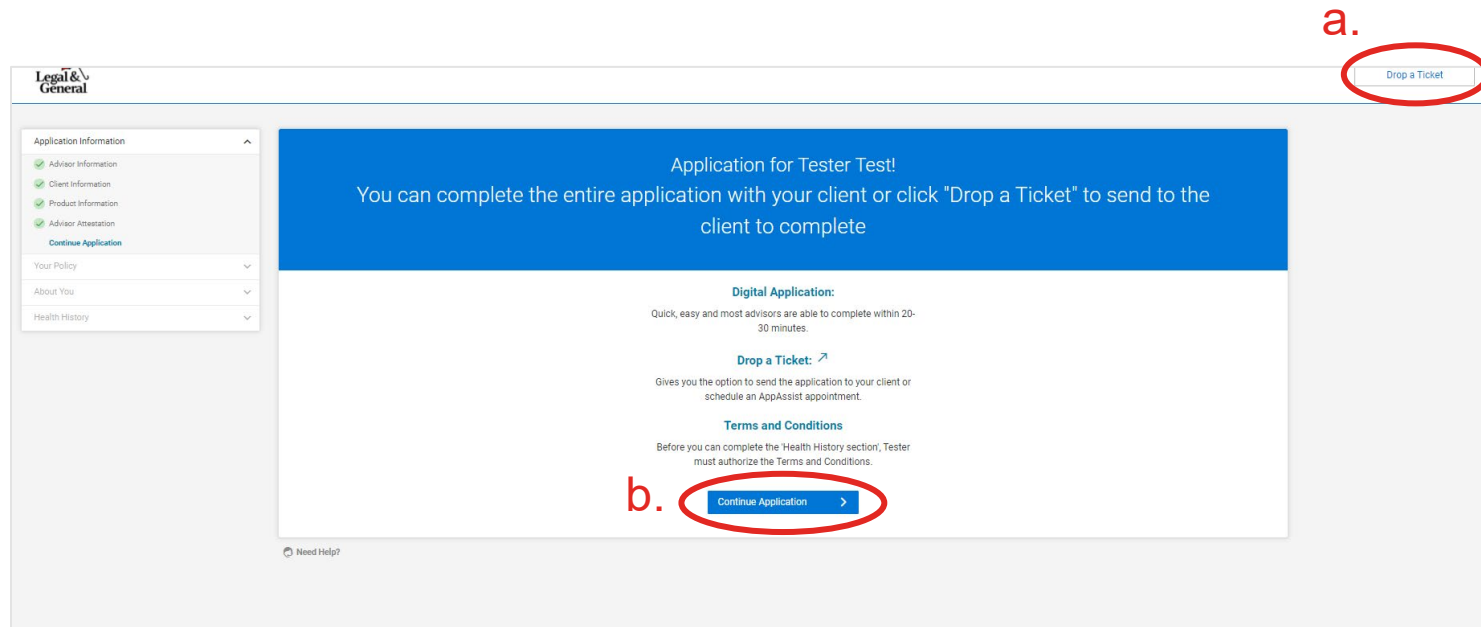
Note: If any information is missing, the system will redirect the user to the fields still requiring completion.

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

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a. 

b. 

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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a.

Application for Tester Test!

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

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 02	TUE 03	WED 04	THU 05	FRI 06	SAT 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

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.

b.

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

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a.

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.

Confirm

b.



**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.

Close

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:

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Associate Product Owner

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