Appliclnt Updates

Banner ExpressComplete Screens

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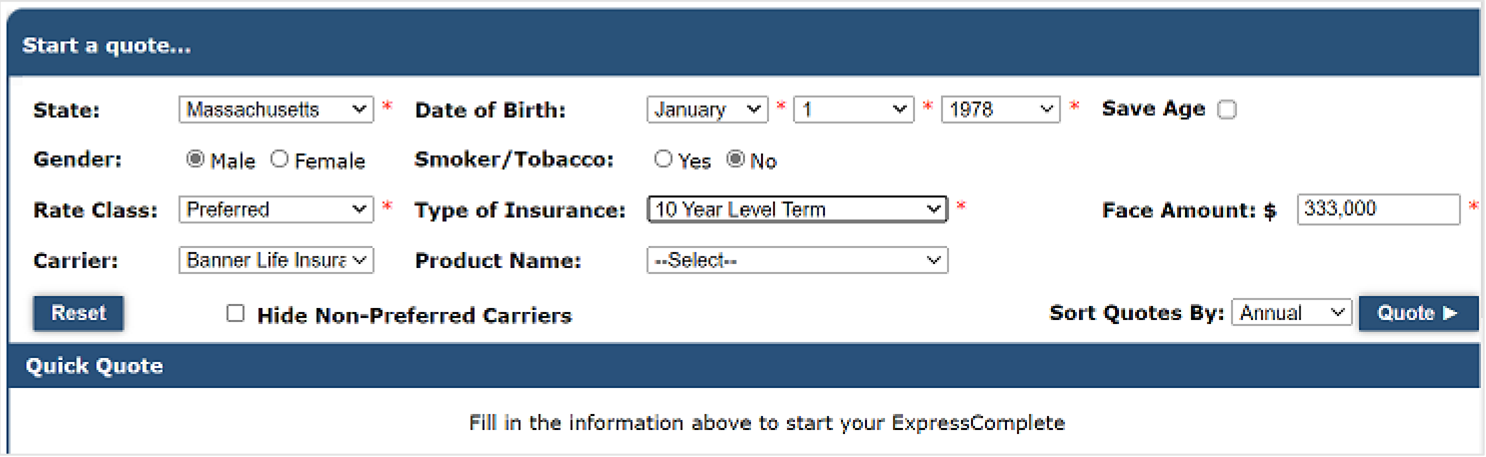

1. Complete the data fields on the **Quote Screen**

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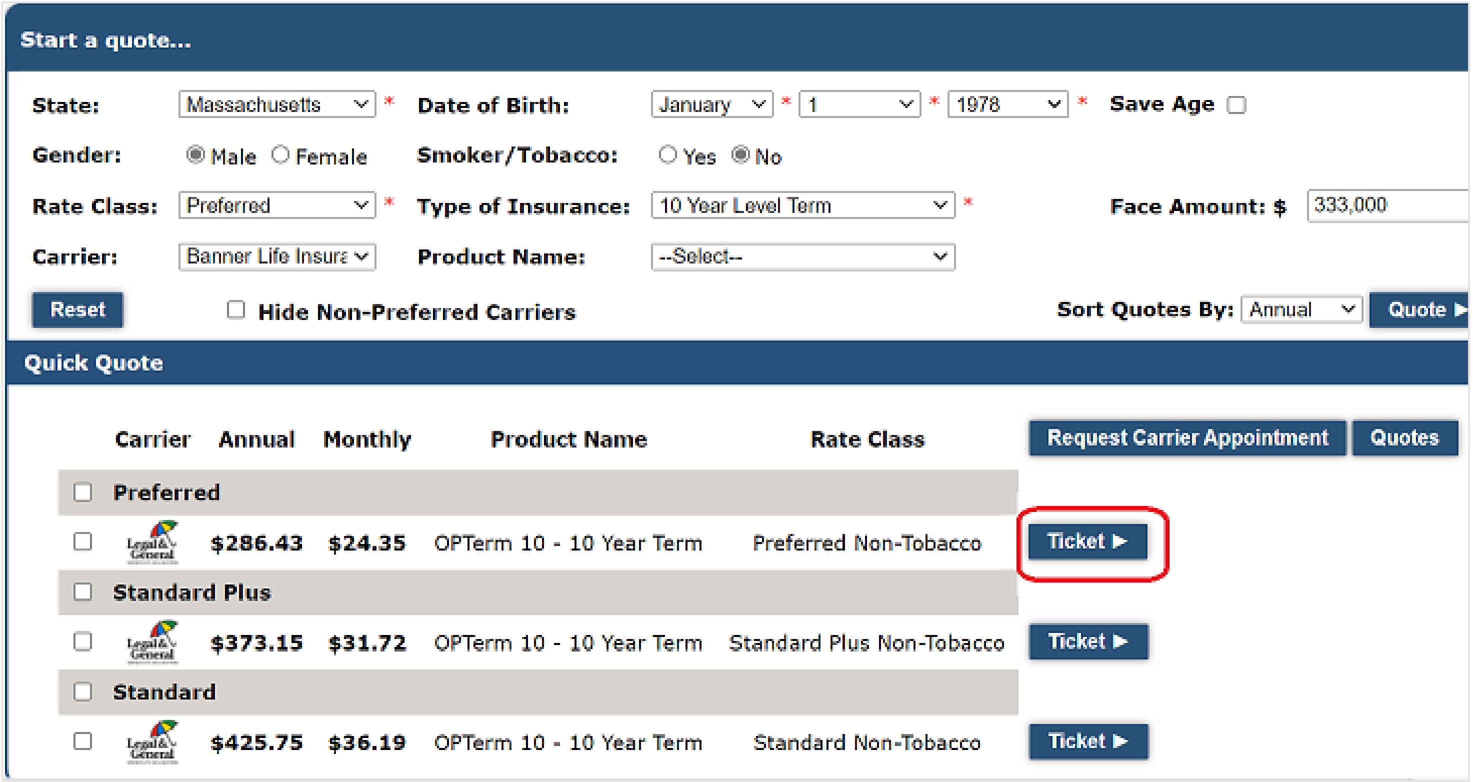

2. The quotes are returned from CompuLife and the user is able to **Select a Ticket**

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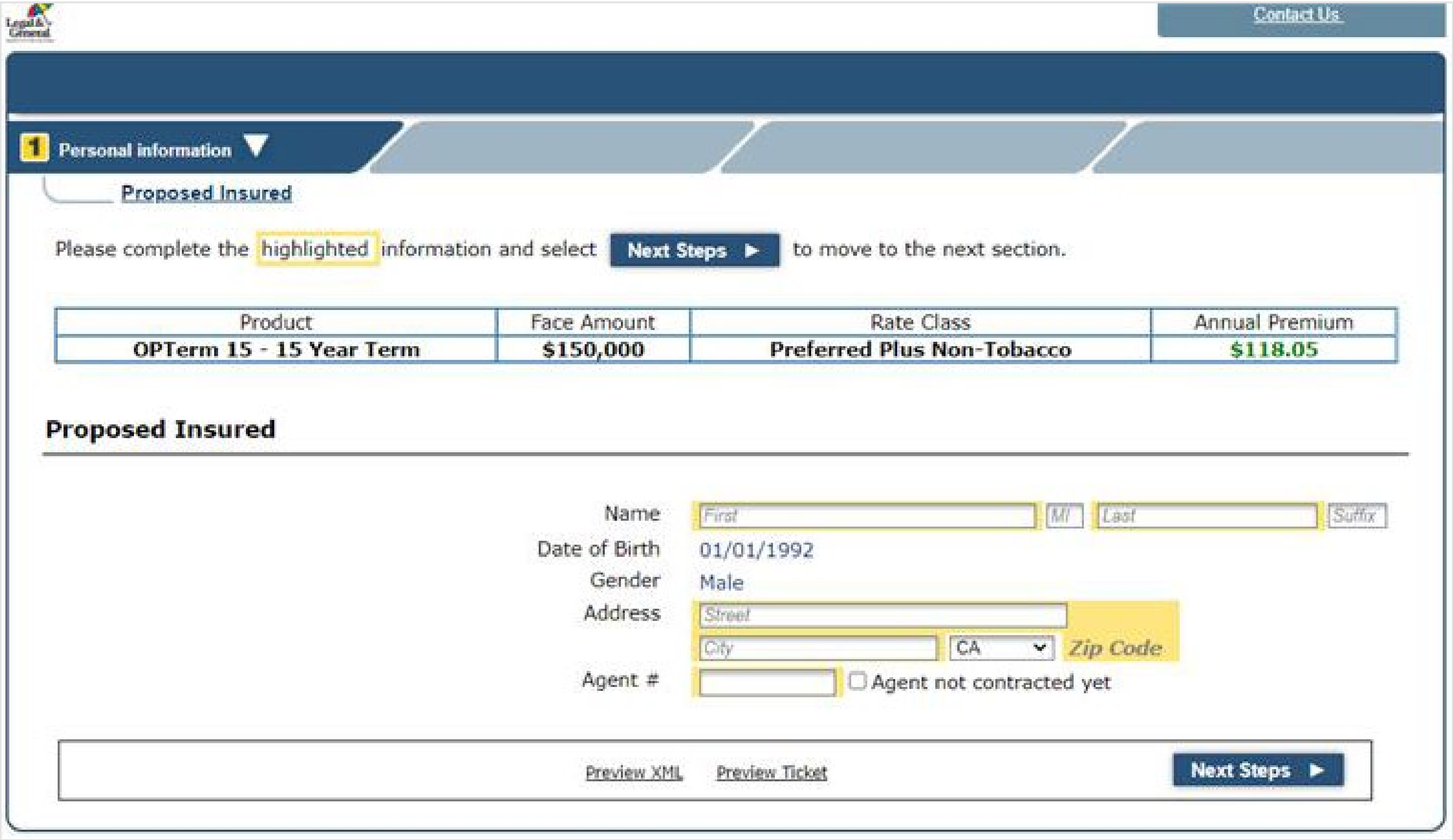

3. Once the Ticket button is selected, the user opens the **Ticket Interview** page – all required data must be entered.
   a. Click on the **Next Steps** button at the top or bottom, the JSON file is sent from ExpressComplete to the Banner API and the URL for accessing the case is activated
   b. This URL has **5 minutes** to be accessed before it times out. **Do not stop here.**

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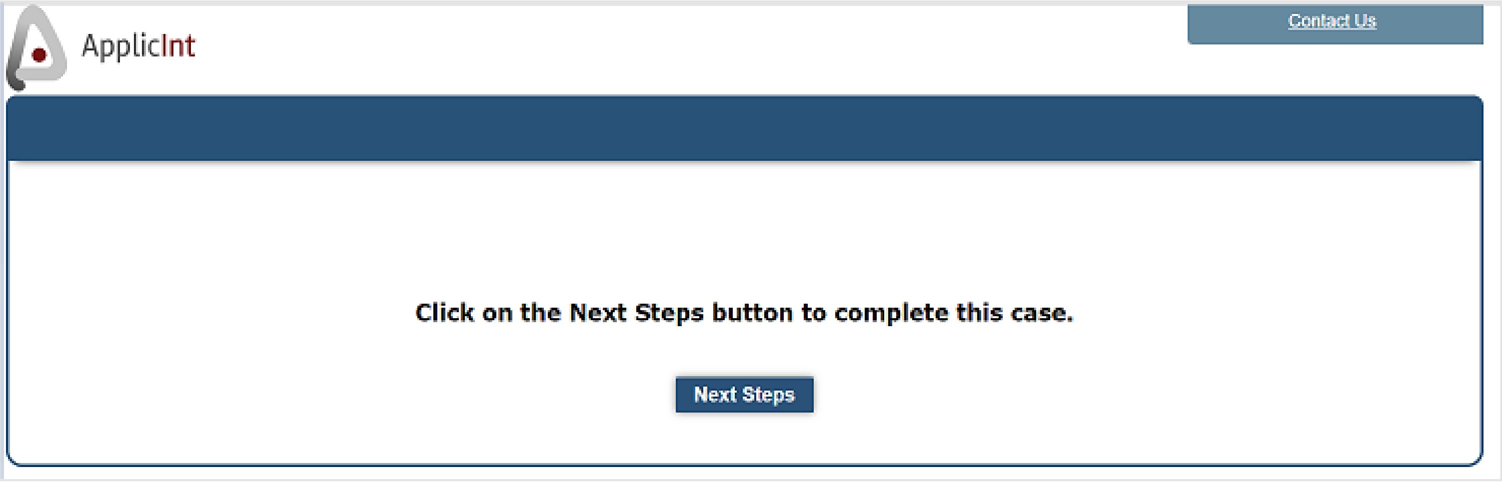

4. When the user clicks the **Next Steps** button on the ticket interview, the JSON file is sent to Banner and the case is created.
   a. Applicint then displays the **Landing Page** with the following button to access the Banner API
   b. Click the **Next Steps** button to move to drop the ticket.

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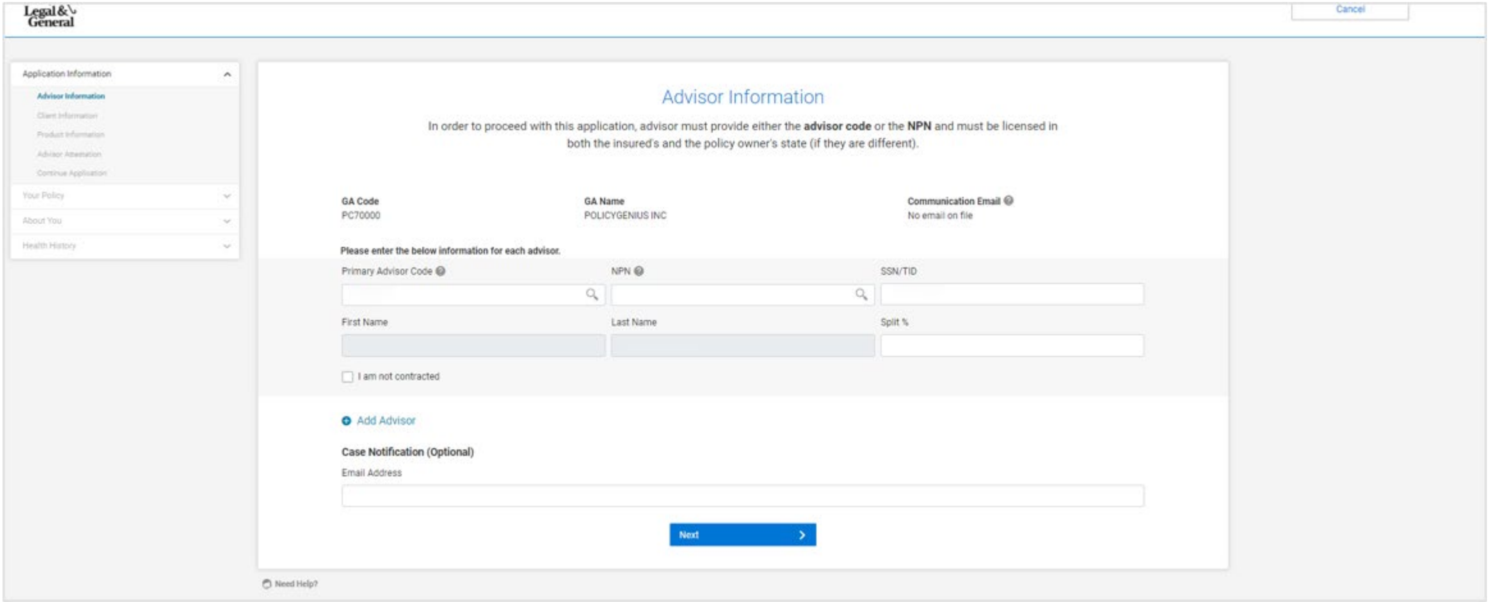

5. The case will open in the Banner API. You will now see the following interface that begins with the **Advisor Information** fields.
   Note: All data entered previously will prefill. Additional information can be added.
   a. If needed, users will enter the agent/advisor code/ssn/name and split. *Note: Users can add additional agents here by clicking the* ***+Add Advisor***
   b. If the agent information is complete and transferred over, users can skip this page.
   c. Select **Next** to continue

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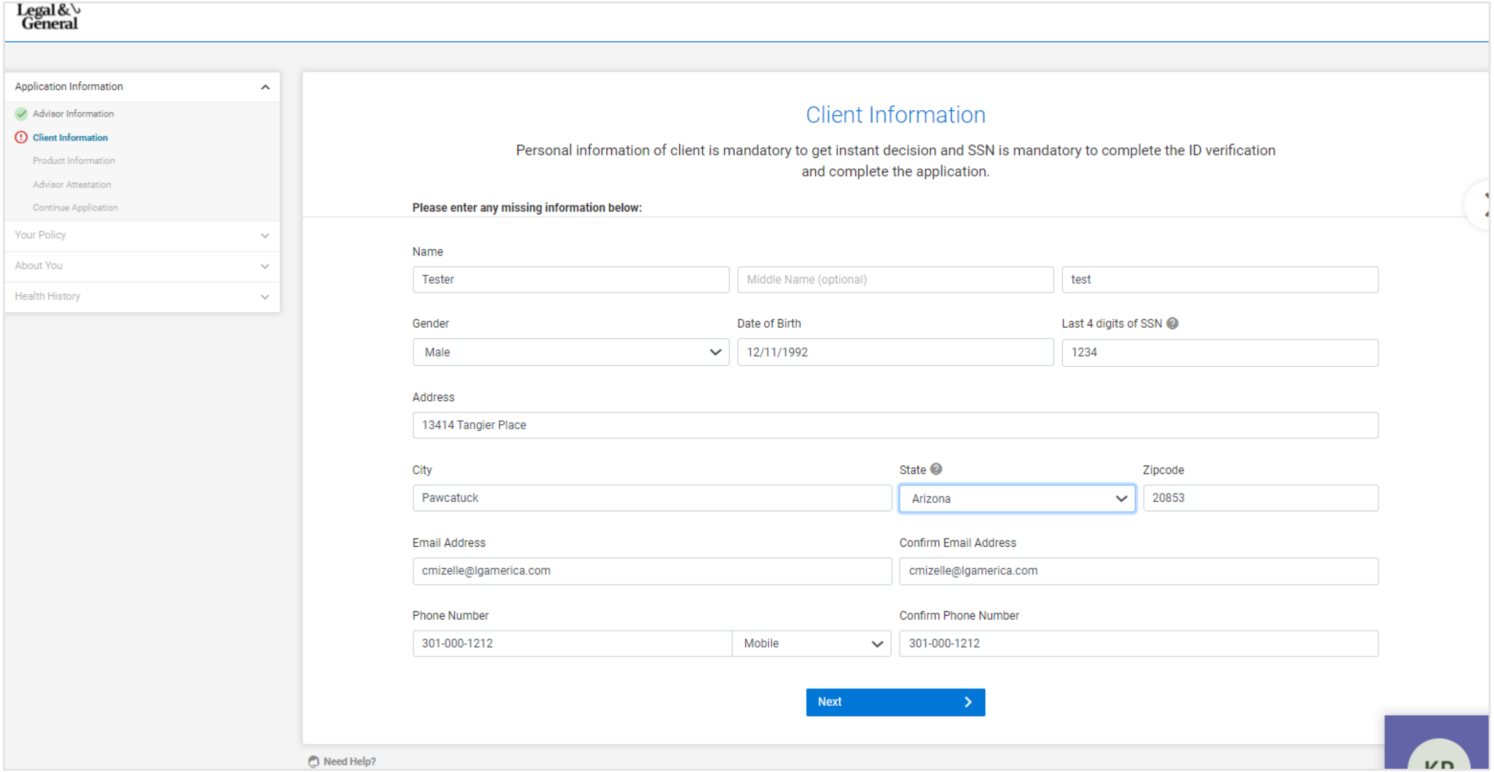

6. Complete the **client information**
   Note: All data entered previously will prefill. Additional information can be added.
   a. Users will need to add the Proposed Insured email address and primary phone number.
   b. Select **Next** to continue

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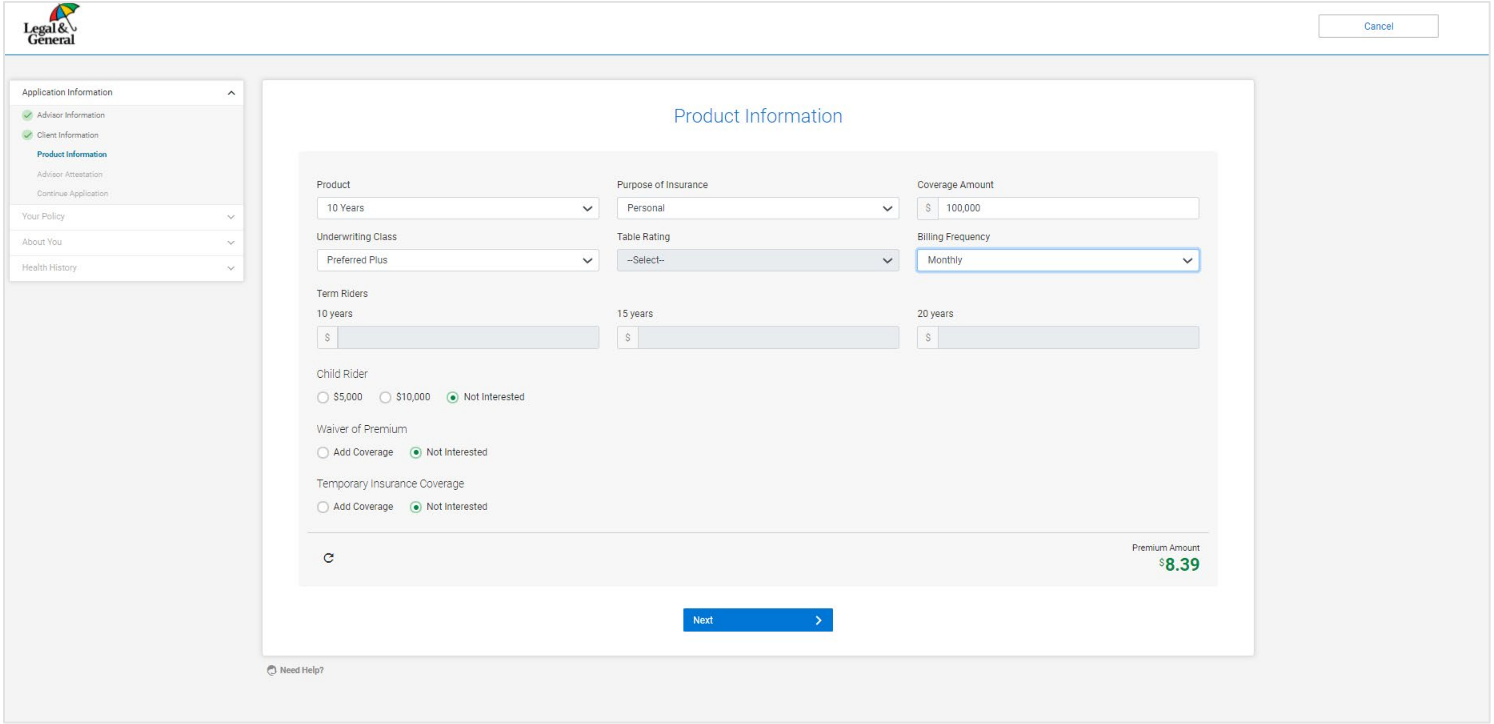

7. Complete the **product information**
   Note: All data entered previously will prefill.
   a. Select **Next** to continue onto the **Advisor Attestation**

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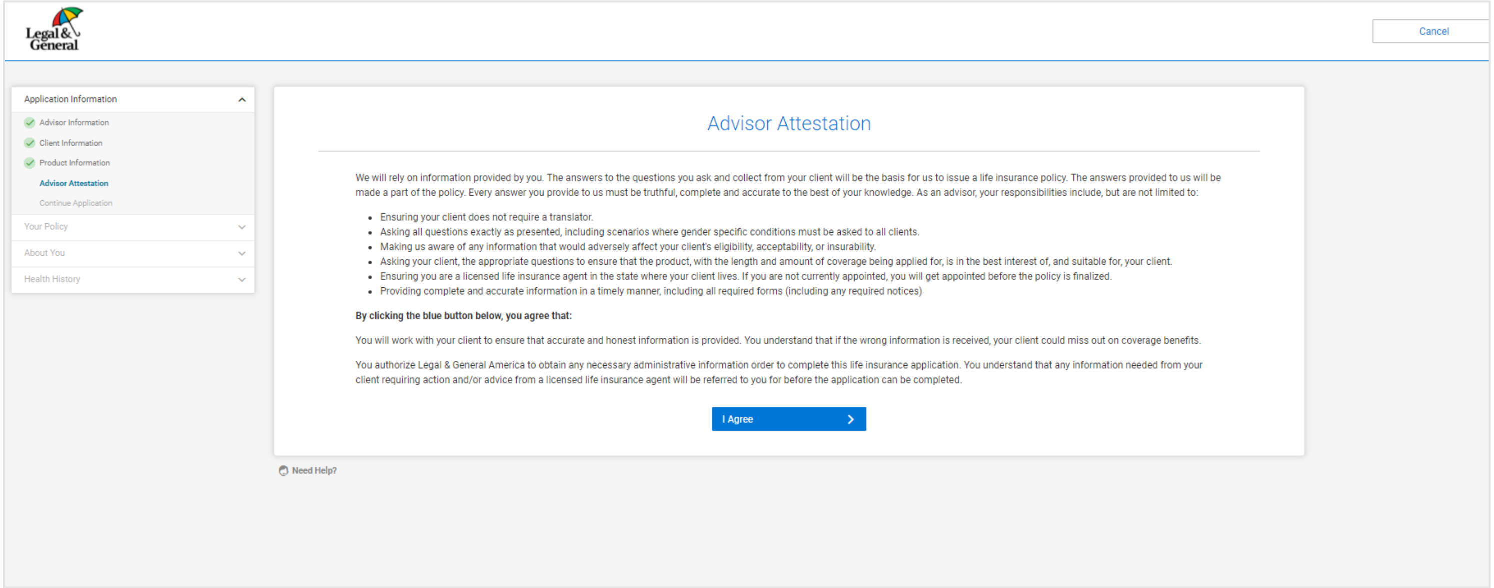

8. If all the information has been entered appropriately, users are directed to the **Advisor Attestation** page.
   Note: If any information is missing, the system will redirect the user to the fields still requiring completion.
   a. To adjust any **Application Information** utilize the left panel 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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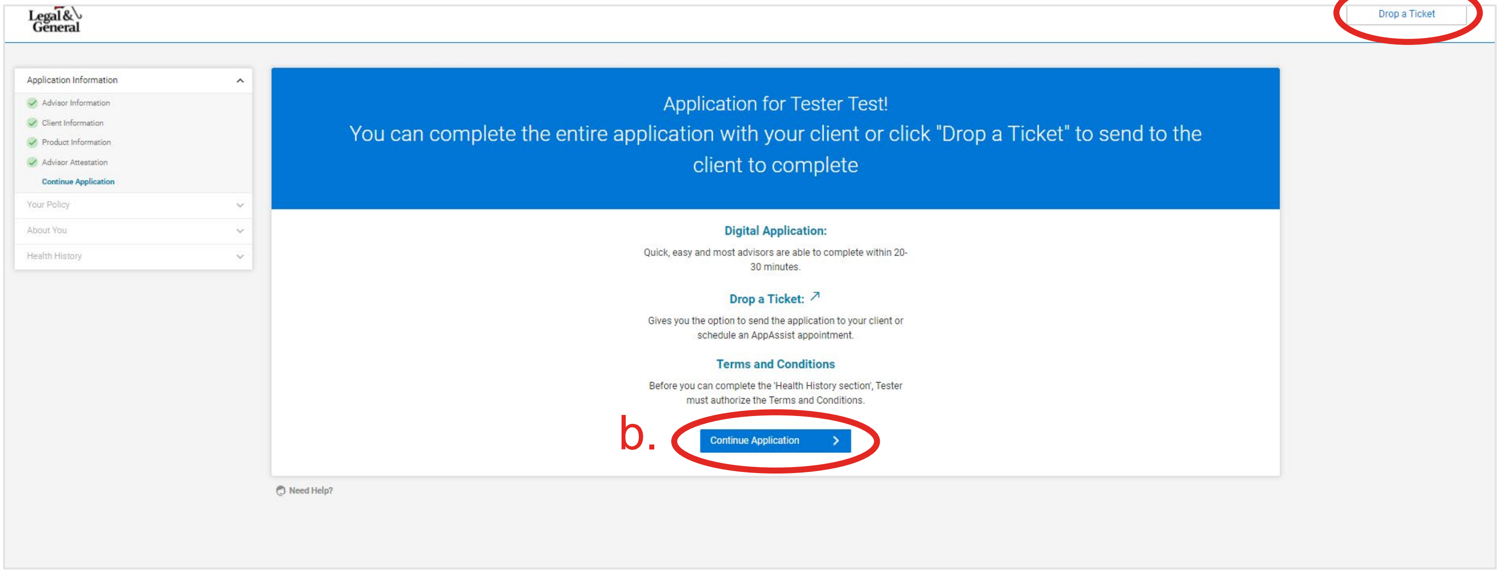
a.



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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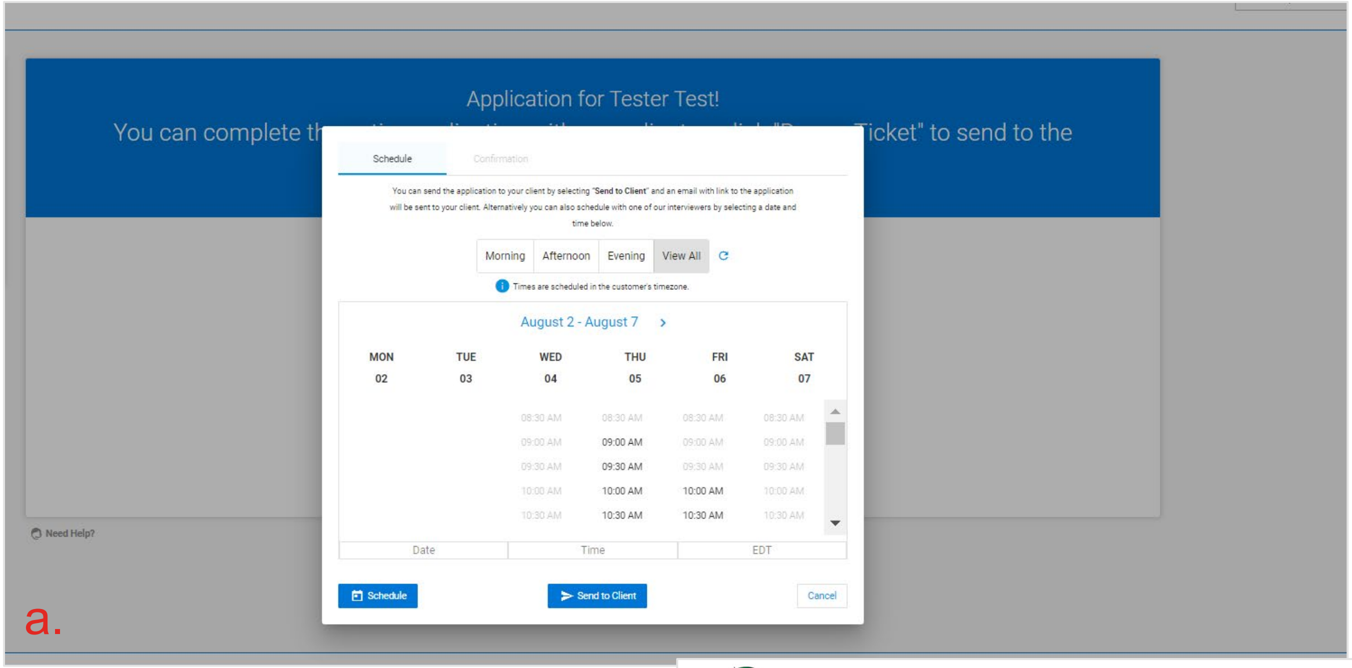
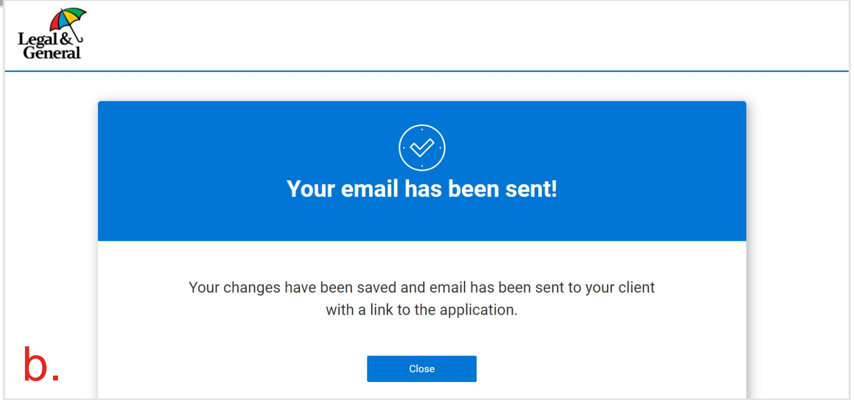
10. After selecting **Drop a Ticket**, users have the option to **schedule a phone interview** or **send a link** to the customer to complete online.
    a. To schedule a phone interview, select the date and time then click on **Schedule**.
    b. If the user opted to **Send a Link**, they will receive a confirmation dialogue confirming the link was sent. Select **Close** to complete.



a.



b.

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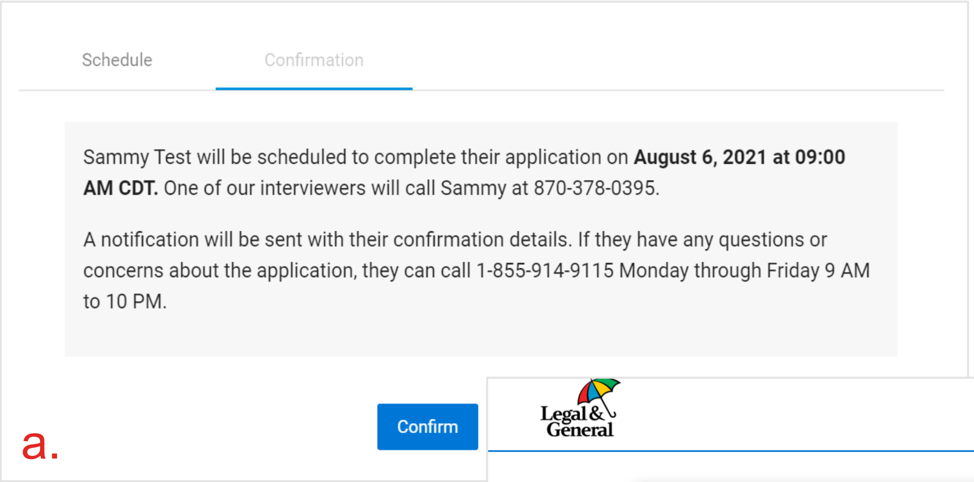
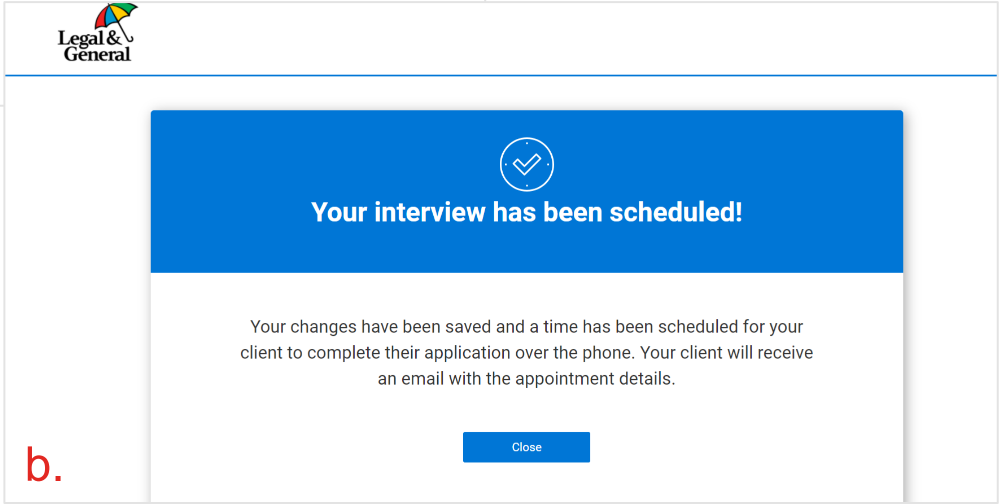


a.



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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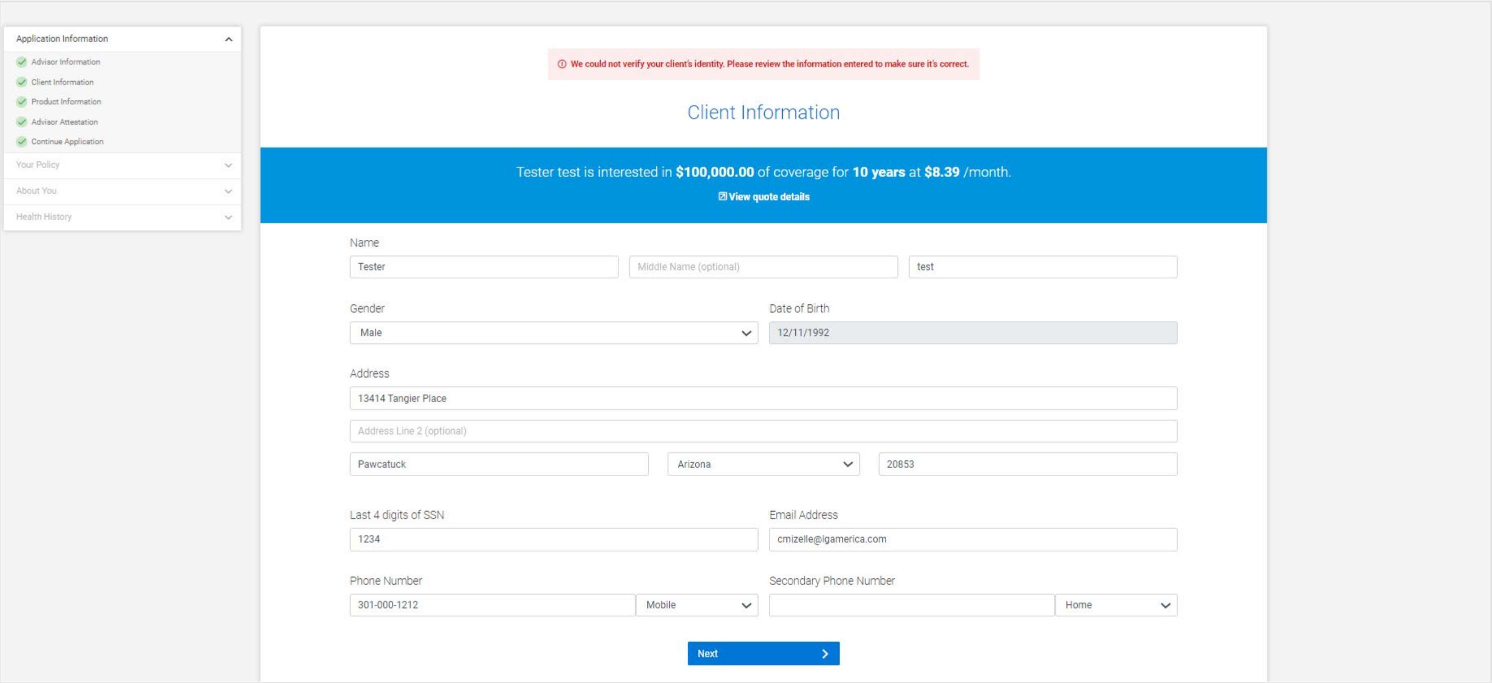

12. After selecting, **Continue Application** users will be directed to the first page of the application to complete **Client Information**.
    a. Ensure all information is completed fully and without error.
    b. Continue through the application.
    c. If users elect to complete the health sections, they must send T&C's to the customer to sign off on.

For more information contact:

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