



# iPipeline Updates:

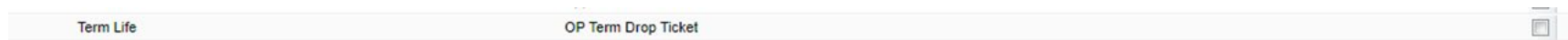
Introducing the Horizon Experience

# iPipeline Updates: the Horizon Experience



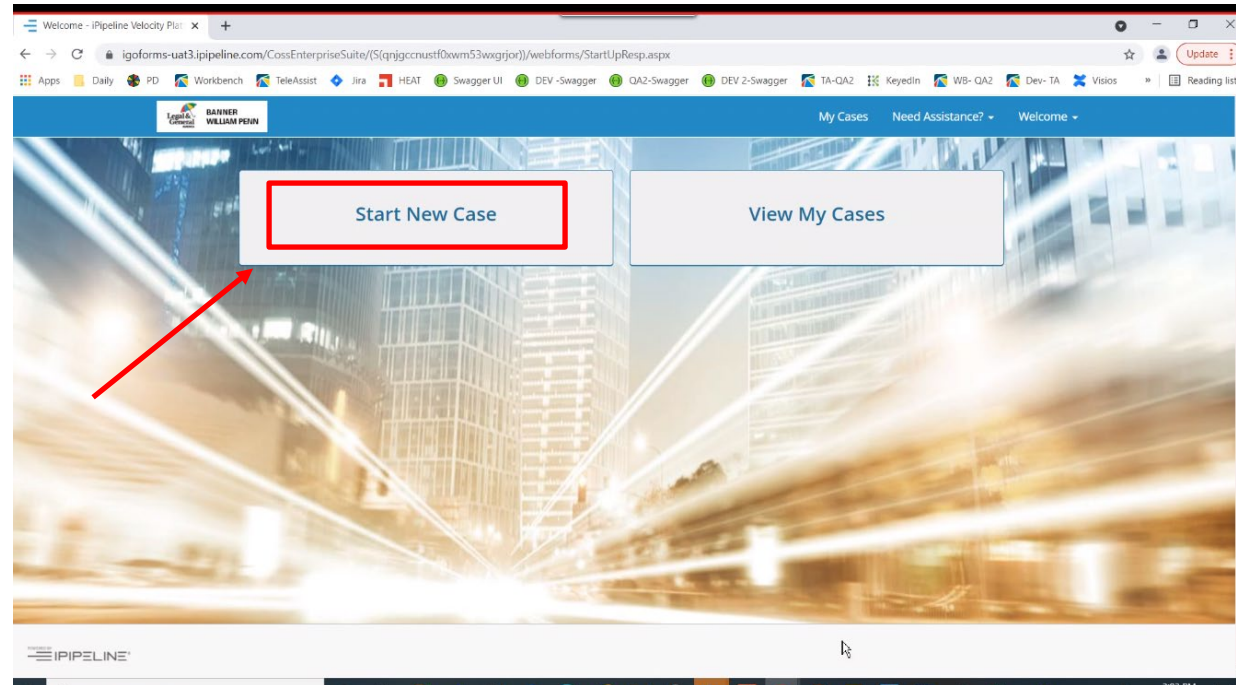
Welcome to the Horizon Experience on iPipeline! We've put together a helpful list of what these changes mean for your business process as you review these slides:

- The GA will no longer be required to release a ticket to us once an advisor “drops a ticket.” Notice will be provided to the GA as a blind copy of the email that is sent from the advisor to the client.
- Once notice is received, the GA can now access the information from the dashboard once the case moves to “Link Sent” status. Please note the ticket information will no longer be available once the ticket moves to “Application Started” status.
- The advisor will now complete a few extra steps on our site to complete the process versus stopping after a ticket has been “locked.”
- **Note: you may need to change your profile settings in iPipeline to reauthorize Banner.** See screenshot below.



Contact us directly with any additional questions. Thank you and welcome to Horizon.

# iPipeline Updates: the Horizon Experience



1. On the main page, select “Start New Case.”

# iPipeline Updates: the Horizon Experience



Start New Case

**Case Information**

Status	Date Modified
Started	11/08/2021

Proposed Insured

First Name

Last Name

Date of Birth

Age

Gender

Case Description

(Examples: \$500,000.00, Kid's Policy, Business Policy, etc)

Carrier and Product

State:

Product Type

Product

- Please choose State and Product Type above and click "Find Available Products"

2. After clicking “Start New Case,” you will land on the case information screen. Note that you must complete the yellow highlighted fields. All populated fields will carry over and prepopulate the digital application.


# iPipeline Updates: the Horizon Experience



Carrier and Product

State: New York Product Type: Term Life **Find Available Products**


Product

Carrier	Product	iGO e-App
 WILLIAM PENN	AppAssist Forms	<b>Select</b>

Carrier and Product

State: Alaska Product Type: Term Life **Find Available Products**

Product

Carrier	Product	iGO e-App
 BANNER	OP Term Drop Ticket	<b>Select</b>

The image displays two screenshots of the iPipeline interface. The top screenshot shows the 'Carrier and Product' section for New York, where the 'Product Type' is set to 'Term Life'. The 'Find Available Products' button is highlighted in blue, and the 'Select' button for the 'AppAssist Forms' product is also highlighted. The bottom screenshot shows the same section for Alaska, where the 'Find Available Products' button is also highlighted in blue, and the 'Select' button for the 'OP Term Drop Ticket' product is highlighted. Red arrows point to the highlighted buttons in both screenshots.

3. Once you have populated the “Product Type” field, the “Find Available Products” button will turn from gray to blue. Click on the “Find Available Products” button.
4. If the state field is New York, you will see “AppAssist Forms” for William Penn. If the state field is any state but New York, you will see “OPTerm Drop Ticket” for Banner.
5. Hit the “Select” button on either view to proceed to the application screen.

# iPipeline Updates: the Horizon Experience



Carr, Bettye  
Banner Life

OP Term Drop Ticket

Case Notes Save View Forms Case Actions

Case Information Application

Proposed Insured

Personal Details

Insured Legal Name

First Middle Last

Bettye Carr

Date of Birth Age Date to Save Age

06/13/1970 51 Yes No

Gender Last 4 digits of SSN

Male Female

Residence Address

Street Address Street Address Line 2

Enter a location Choose from list or type

City State Zip Code

Choose from list or type

Contact Information

E-mail

Primary Telephone Number Primary Phone Type Secondary Telephone Number Secondary Phone Type

Choose from list or type

By answering yes, I consent to receive phone calls, emails, and text messages from Legal & General America, its financial professionals, or third parties calling on its behalf, regarding its products and services at the phone number(s) above, including my wireless number if provided. I understand these calls may be generated using an automatic telephone dialing system or prerecorded voice message for telemarketing purposes. I understand to make a purchase I do not need to consent to receive calls from Legal & General America and can instead call them directly at 1-800-638-8428.

Yes No

Is the Owner the same as the Proposed Insured?

Yes No

What is the purpose of this insurance?

Choose from list or type in and press Enter

Next >

- Once the prior screen has been completed with carrier and product, all previously filled out information fields from the prior screen will carry over to the application screen and prepopulate the digital application. As noted in a previous slide, you must complete the yellow highlighted fields.
- After fields are completed, click on the “Next” button at the bottom of the screen on the right to move onto coverage.



# iPipeline Updates: the Horizon Experience



Case Information Application

Proposed Insured  
Coverage Information  
Producer Information  
Validate and Lock

### Coverage Information

Product Name  
OPTerm Drop Ticket

Term Duration  
Choose from list or type in and press Enter

Modal Premium Amount  
\$0.00

Health Class  
Choose from list or type in and press Enter

Face Amount  
\$0  
Valid Range: \$100,000 - \$10,000,000

Billing Frequency  
Choose from list or type in and press Enter

Payment Method  
Choose from list or type in and press Enter

### Optional Benefit Riders

☐ Children's Term Rider

☐ Waiver of Premium

< Back Next >

- On the coverage screen, all previously filled out information fields will carry over. Again, all fields highlighted in yellow must be completed. The "Payment method" field can be updated as needed.
- Click the "Next" button to proceed to producer information.

# iPipeline Updates: the Horizon Experience



The screenshot displays the 'Application' tab in the iPipeline system. On the left, a sidebar lists navigation options: 'Proposed Insured' (checked), 'Coverage Information' (checked), 'Producer Information' (active), and 'Validate and Lock'. The main content area is titled 'Case Information' and 'Application'. It contains several form fields: 'If your client is eligible, would you like us to offer temporary insurance coverage?' (radio buttons for Yes/No), 'Are you currently appointed with Banner Life?' (radio buttons for Yes/No), 'Brokerage General Agency Name' (text field), 'BGA Code' (text field, highlighted with a red box and a red arrow), 'First Name', 'Middle Name', 'Last Name' (text fields), 'Producer Code', 'Producer SSN' (text fields), 'Phone' (text field), 'E-mail' (text field), 'Will there be an additional producer associated with this contract?' (radio buttons for Yes/No, with 'No' selected), and 'Producer Share %' (text field showing 100%). At the bottom, there are two buttons: '< Back' and 'Next >' (highlighted with a red box and a red arrow).

10. On the producer information screen, all previously filled out information fields will carry over. Again, all fields highlighted in yellow must be completed. If not appointed with LGA, you will need to enter the BGA code.

11. Click the “Next” button to proceed to validate and lock.



# iPipeline Updates: the Horizon Experience



Carr Bettye  
Banner Life

OP Term Drop Ticket

Case Notes Save View Forms Case Actions

Case Information Application

Proposed Insured  
Coverage Information  
Producer Information  
Validate and Lock

### Validate and Lock

✔ Congratulations! Your ticket is almost complete. Please click the button below to lock the ticket on iPipeline and proceed to drop the ticket or complete the application.

Please click the "Lock ticket and proceed to the next step in the application process".

Lock ticket

← Back

Carr Bettye  
Banner Life

OP Term Drop Ticket

Case Notes Save View Forms Case Actions

Case Information Application

Proposed Insured  
Coverage Information  
Producer Information  
Validate and Lock

### Validate and Lock

ℹ The application has been locked!

Your application has been digitally locked to protect client data from alteration after it has been completed to this point.

This information will remain on iPipeline for 120 days after no activity.

Unlock Application Data and Cancel Signature Process

Proceed to the Next Step in the Application Process

← Back

12. On the validate and lock screen, select "Lock Ticket."

13. Then, select the blue button to "Proceed to the Next Step in the Application Process" to move onto the LGA digital application and attestation page. Note that this step replaces GO NO GO.

# iPipeline Updates: the Horizon Experience



Application Information ^

- ✓ Advisor Information
- ✓ Additional 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 >**

14. On the advisor attestation page, click the “I agree” button to continue. Should you need to go back and change any of your information, you can do so using the left navigation panel.

# iPipeline Updates: the Horizon Experience



15. You then need to decide to:

- drop a ticket/set up a phone interview by clicking the “Drop a Ticket” button in the top right
- continue the application with the client by clicking the “Continue Application” button in the middle bottom.

# iPipeline Updates: the Horizon Experience



Drop a Ticket

You can schedule 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.

November 8 - November 13

MON 08	TUE 09	WED 10	THU 11	FRI 12	SAT 13
04:30 AM	04:30 AM	04:30 AM	04:30 AM	04:30 AM	04:30 AM
05:00 AM	05:00 AM	05:00 AM	05:00 AM	05:00 AM	05:00 AM
05:30 AM	05:30 AM	05:30 AM	05:30 AM	05:30 AM	05:30 AM
06:00 AM	06:00 AM	06:00 AM	06:00 AM	06:00 AM	06:00 AM
06:30 AM	06:30 AM	06:30 AM	06:30 AM	06:30 AM	06:30 AM

Date Time AKST


Schedule Send to Client Cancel

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Application # 5400032928

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**Your email has been sent!**

Your changes have been saved and email has been sent to your client with a link to the application.

16. If you select to drop a ticket, you will see a scheduler screen as shown above. Click the “Send to Client” button to share an application link with your client. Once completed, you will see a confirmation screen.
17. Close out the browser from the confirmation screen. If you select a date and time on the scheduler screen after opting to “Drop Ticket” (prior screen), you can click the “Schedule” button to schedule the interview.

# iPipeline Updates: the Horizon Experience



Schedule

Confirmation



Christine Mizelle tester will be scheduled to complete their application on **October 21, 2021 at 03:30 PM EDT**. One of our interviewers will call Christine Mizelle at 240-907-6103.

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

Cancel



**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

18. Once you have selected the “Schedule” button, you will see a confirmation screen.
19. Click “Confirm” after reviewing the information show. You will see another confirmation screen letting you know that the interview has been scheduled.
20. Click “Close” to close out of the browser for the interview confirmation screen.

Please ensure you follow all the steps to submit your ticket.

## For more information contact:

**Christine Mizelle**

Associate Product Owner

[cmizelle@lgamerica.com](mailto:cmizelle@lgamerica.com)

or

**iPipeline Tech Support**

[igosupport@ipipeline.com](mailto:igosupport@ipipeline.com)

