

# BULLETIN

A Communication from  
the Life Insurance Division



PACIFIC LIFE

Pacific Life Insurance Company

**DATE:** November 11, 2021

**TO:** Broker General Agencies, Life Insurance Producers, Management, Office Administrators, and Technical Staff

**SUBJECT:** New Delegate Support Process In Producer Bay

Category	
<input checked="" type="checkbox"/>	Administration
<input type="checkbox"/>	Compliance
<input type="checkbox"/>	Marketing
<input type="checkbox"/>	Product
<input type="checkbox"/>	Risk Selection
<input type="checkbox"/>	Miscellaneous

## New Producer Bay Delegation Process

Effective November 11, 2021, you will be able to authorize another person, known as a delegate, from your staff or a business partner\* to process and manage your life insurance business in Producer Bay. We are also including a security feature which will require you to reauthorize your delegates every 90 days.

After authorization, your delegate can:

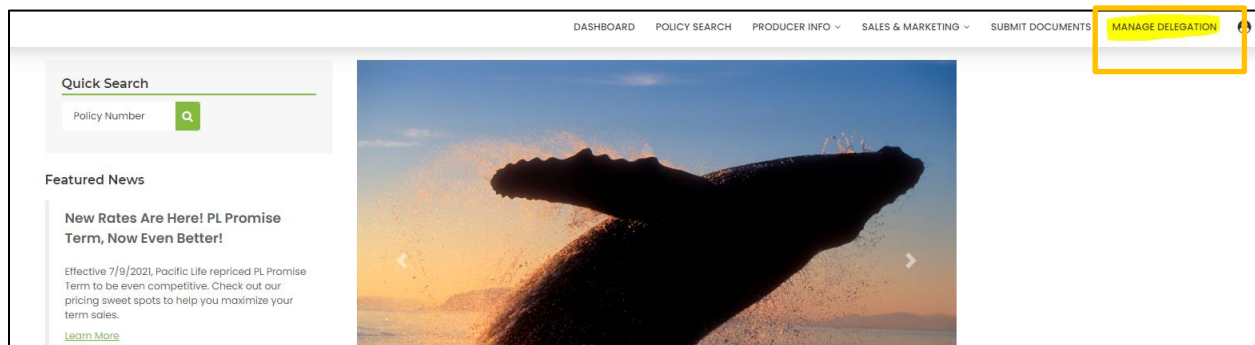
- Create quotes
- Order and download administrative forms and marketing materials
- Check application status or view inforce cases
- Upload requirements and forms on existing cases
- Check producer licensing and appointment status
- View commission statements (optional permission)

***\*Your contracted producers are not eligible to become a delegate. They will need to register for their own account with their producer code number.***

### Producer Bay—Your Access Point

The following sample screen shots show you how to add and manage a delegate.

- Login to Producer Bay at <http://producerbay.pacificlife.com/>
- Select “Manage Delegation”



## Landing Page

- Select “Invite Delegate”

**My Delegations**

Welcome to the My Delegations screen where you can view your invited delegates, active delegates and inactive delegates. All active delegates must be reviewed and reapproved every 90 days.

**Invitations**

These delegates have been extended an email invitation, but have not yet registered

[+ Invite delegate](#)

No active delegations found

**Active Delegates**

These delegates currently have access to your book of business within Pacific Life

[Reapprove All](#)

Frenia San Luis (frenia@nl.com)

**Inactive Delegates**

These delegates have been inactivated and no longer have access to your policies

[Show/Hide](#)

## Invite Delegate & Permissions Page

- Enter the delegate's email address
- Select any additional permissions you would like them to have (if you have access to Planned Performance Tracking or Lifeline, you will also see those options).
- After you add a delegate, they will receive a registration email. Once the delegate registers, they can begin assisting you.

**Invite Delegate**

As a financial professional, you may designate one or more members of your staff or business partners as a delegate to use Pacific Life's Life Insurance Division's website(s) on your behalf. Once assigned, the delegate(s) will have access to all websites you have access to and all policies that you are currently servicing. You are responsible for your delegate's actions within these websites.

To provide a delegate with access, enter the delegate's email, select Delegate's additional permission if appropriate, and then click Save button.

Delegate's email address

**Additional Permissions**

As part of their access, delegates will automatically have access to all functionality within any website you've authorized. There are exceptions to functionality which are listed below. In order for your delegate to access the additional functionality, you must manually select the boxes below in order to grant permission. If you do not wish to grant additional permission, leave these boxes unchecked and click Save. You may change this permission at any time.

**PPT - Additional Permissions**

☐ Variable & Indexed Transactions

☐ Commission Statements

**ProducerBay - Additional Permissions**

☐ Commission Statements

☐ Enforce policies

☐ Pending policies

[Cancel](#) [Save](#)

## Security Feature

To help prevent unauthorized access, you will need to **reauthorize your delegates every 90 days**. Reminder emails will be sent to you prior to your delegate's access expiring with a link to the reauthorization location. You will also receive a pop up reminder message after logging on to Producer Bay.

Pacific Life remains committed to making it easier for Brokerage General Agents (BGAs) and life insurance producers to do business with us. If you have questions or trouble accessing the Producer Bay website, please contact us at [LynDistributorServices@PacificLife.com](mailto:LynDistributorServices@PacificLife.com) or (844) 238-4872.

***Pacific Life is a product provider. It is not a fiduciary and therefore does not give advice or make recommendations regarding insurance or investment products.***



Pacific Life Insurance Company is licensed to issue insurance products in all states except New York. Product/material availability and features may vary by state. Insurance products and their guarantees, including optional benefits and any crediting rates, are backed by the financial strength and claims-paying ability of the issuing insurance company. Look to the strength of the life insurance company with regard to such guarantees as these guarantees are not backed by the broker-dealer, insurance agency, or their affiliates from which products are purchased. Neither these entities nor their representatives make any representation or assurance regarding the claims-paying ability of the life insurance company.

This bulletin is distributed through Pacific Life, Lynchburg, VA (844) 276-5759.

Pacific Life Insurance Company's Home Office is located in Newport Beach, CA.

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