

# **Increased Visibility**

# Now available: Workboard section for digital applications

Now advisors will have the ability to view select activities that impact the status of the case and provide further detailed insight.

#### What is the enhancement?

We're introducing a new section, Workboard, within Application Manager. Users can now see select status activities happening behind the scenes such as licensing, lab lift, medical review, and special handling.

## Why is it happening?

This extra level of information is intended to add more transparency to the application processing timeline.

## Who does it impact?

This change will affect the advisors and save them time from having to reach out to us for an update.

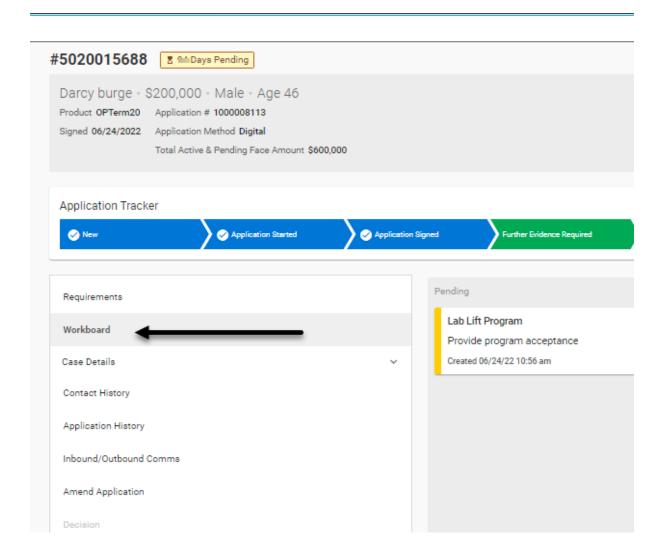
## When is it happening?

Wednesday, September 28th



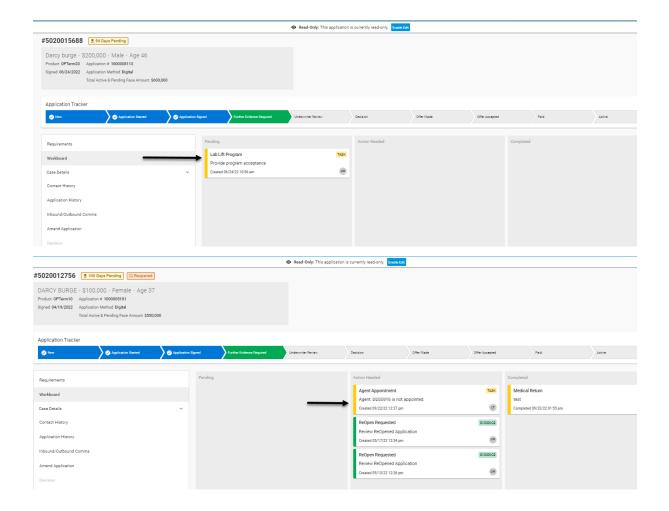
#### How does it work?

1. The new Workboard section will be visible within Application manager in the left-hand navigation panel between the Requirements and Case Details.



2. If applicable, you'll see administrative activity for departments such as Licensing, Case Management, and/or underwriting under action needed.





3. There is no action needed by the advisor, just knowledge that the application has hit a pitstop and should be on its way to the next stop, shortly.

As always, thank you for your continued partnership and support on our shared journey to digitize the life insurance process. Contact our distribution team with any questions or feedback. We look forward to hearing from you.