



# 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.

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### 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 28<sup>th</sup>



## 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.

The screenshot displays the Application Manager interface for a specific application. At the top, the application number #5020015688 is shown next to a status indicator 'Days Pending'. Below this, a summary box contains the following information: Darcy burge, \$200,000, Male, Age 46; Product OPTerm20, Application # 1000008113; Signed 06/24/2022, Application Method Digital; and Total Active & Pending Face Amount \$600,000.

The Application Tracker section shows a progress bar with four stages: New (checked), Application Started (checked), Application Signed (checked), and Further Evidence Required (pending).

The left-hand navigation panel lists several options: Requirements, Workboard (highlighted with a black arrow), Case Details, Contact History, Application History, Inbound/Outbound Comms, Amend Application, and Decision.

The main content area shows the 'Pending' status with a yellow bar indicating the 'Lab Lift Program'. Below this, it states 'Provide program acceptance' and 'Created 06/24/22 10:56 am'.

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



**#5020015688** 94 Days Pending Read-Only: This application is currently read-only. [Create Edit](#)

Darcy burge - \$200,000 - Male - Age 46  
 Product OPTerm20 Application # 1000008113  
 Signed 06/24/2022 Application Method Digital  
 Total Active & Pending Face Amount \$600,000

**Application Tracker**

[New](#)
[Application Started](#)
[Application Signed](#)
[Further Evidence Required](#)
[Underwriter Review](#)
[Decision](#)
[Offer Made](#)
[Offer Accepted](#)
[Paid](#)
[Active](#)

Requirements	Pending	Action Needed	Completed
<a href="#">Workboard</a> <a href="#">Case Details</a> <a href="#">Contact History</a> <a href="#">Application History</a> <a href="#">Inbound/Outbound Comms</a> <a href="#">Amend Application</a> <a href="#">Decision</a>	<p><b>Lab Lift Program</b> <span>Task</span></p> <p>Provide program acceptance</p> <p>Created 06/24/22 10:56 am <span>OFF</span></p>		

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**#5020012756** 188 Days Pending Reopened Read-Only: This application is currently read-only. [Create Edit](#)

DARCY BURGE - \$100,000 - Female - Age 37  
 Product OPTerm10 Application # 1000005181  
 Signed 04/19/2022 Application Method Digital  
 Total Active & Pending Face Amount \$550,000

**Application Tracker**

[New](#)
[Application Started](#)
[Application Signed](#)
[Further Evidence Required](#)
[Underwriter Review](#)
[Decision](#)
[Offer Made](#)
[Offer Accepted](#)
[Paid](#)
[Active](#)

Requirements	Pending	Action Needed	Completed
<a href="#">Workboard</a> <a href="#">Case Details</a> <a href="#">Contact History</a> <a href="#">Application History</a> <a href="#">Inbound/Outbound Comms</a> <a href="#">Amend Application</a> <a href="#">Decision</a>		<p><b>Agent Appointment</b> <span>Task</span></p> <p>Agent: burcuovis is not appointed.</p> <p>Created 09/22/22 12:27 pm <span>OFF</span></p> <p><b>ReOpen Requested</b> <span>Evidence</span></p> <p>Review ReOpened Application</p> <p>Created 05/17/22 12:34 pm <span>OFF</span></p> <p><b>ReOpen Requested</b> <span>Evidence</span></p> <p>Review ReOpened Application</p> <p>Created 05/13/22 12:36 pm <span>OFF</span></p>	<p><b>Medical Return</b></p> <p>test</p> <p>Completed 09/22/22 01:55 pm</p>

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.