

Connex Notifications

Tips and best practices for monitoring your business

Connex offers a number of ways for you to stay up-to-date with your pending cases and inforce business. These features allow you to track the progress of your cases and respond quickly to issues that may lead to case delays or policy cancellations.

Your notification options

New Business notifications

- Application Submission Notification:** Receive real-time notifications confirming an application has been received.
- New Business Case Summary:** Receive periodic updates on pending case requirements. You may customize the frequency these are sent.
- Underwriter Decision Notification:** Real-time notifications of the underwriting decision for your submitted cases.
- **Tip: Want to only track selected New Business cases?**

You can choose to receive emails for the cases that you have bookmarked in the policy list on your Business Dashboard or on the individual Policy Detail pages.

Inforce notifications

- Grace Notification:** Receive alert when an inforce policy moves into Grace period.
- Lapse Notification:** Receive alert when a policy has Lapsed.
- Payment Decline Notification:** Receive alerts when a premium payment using bank draft or credit card is declined.

Note: Inforce notifications are emailed once daily. Each email lists a maximum of 20 policies so you may receive more than one email for each selected category.

Licensing, Contracting and Commission

- Outstanding Requirement:** Receive alert when a new requirement is posted.
- Commission Statement:** Receive alert when a new statement is posted.

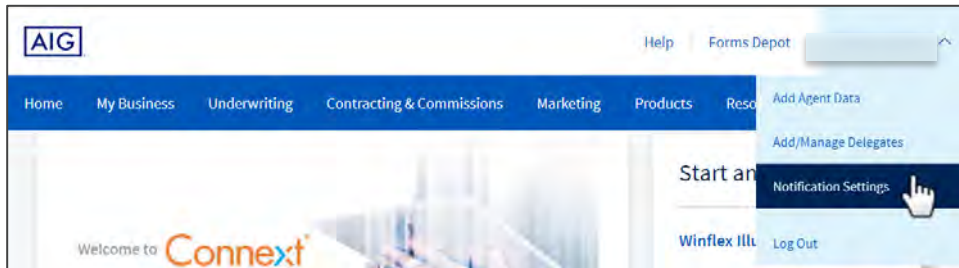
[See the following pages for screen shots and additional details.](#)



FOR FINANCIAL PROFESSIONAL USE ONLY. NOT FOR PUBLIC DISTRIBUTION

Policies issued by American General Life Insurance Company (AGL), Houston, TX, and The United States Life Insurance Company in the City of New York (US Life), members of American International Group, Inc. (AIG).

Setting up and adjusting your Notification Settings



On the **Connex home screen**, click your name in the upper right corner to reveal options.

Hover over and click **Notification Settings**.

This will take you to your email preferences page where you can select the notification(s) you wish to receive.

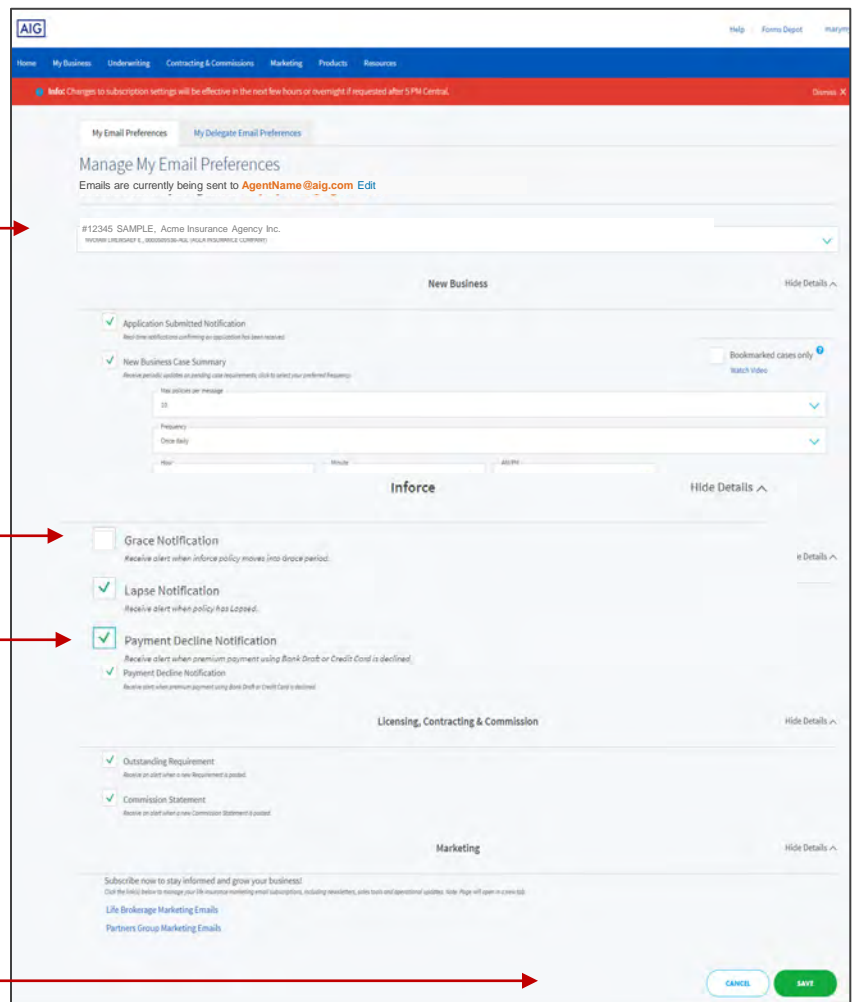
If you have multiple agent numbers, use the **Agent Number dropdown** to view and/or change email subscriptions associated with each agent number. You may select an individual agent number from the list, or Select All to update the notification settings for all your agent numbers at once.

To subscribe to a notification, click the empty box adjacent to the category. A green checkmark will appear.

If a box already has a checkmark, you are subscribed to that notification. To unsubscribe, click on the checkmark to remove it.

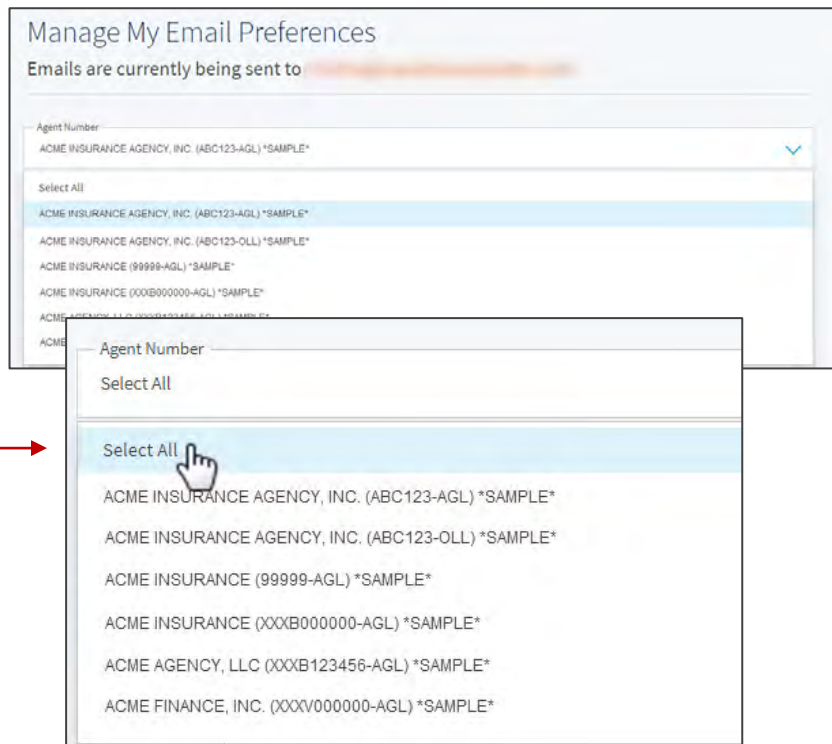
After updating your selections, click the **SAVE button** to save your changes. You will then see a screen noting your updated settings have been saved.

If you do not wish to change your settings, click **CANCEL** to return to the Connex home screen.



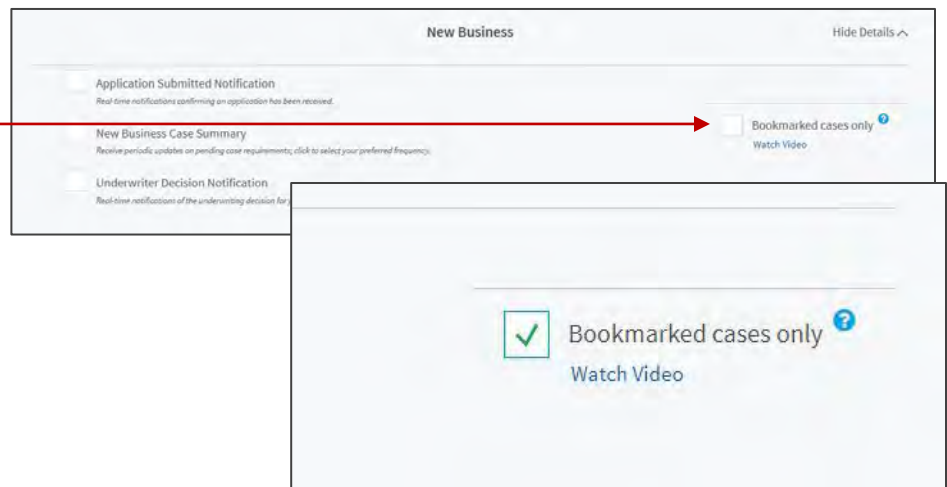
Notification Settings: Tips and tricks

If you have multiple agent numbers, use the Agent Number dropdown to view and/or change email subscriptions associated with each agent number. Click anywhere in the Agent Number bar to display all of your agent numbers.



Note: You may select one code or you may **Select All**. The Select All option will apply any changes you make to all of your agent numbers. To make your selection, scroll through the options, hover over your selection and click to select.

To only track selected New Business cases, click the “Bookmarked cases only” box so a green checkmark appears.



With this option selected, you will only receive emails for cases that you have bookmarked in the policy list on your Business Dashboard page or on their individual Policy Detail pages.

Policies issued by American General Life Insurance Company (AGL), Houston, TX except in New York, where issued by The United States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and US Life are responsible for financial obligations of insurance products and are members of American International Group, Inc. (AIG). AGL does not solicit, issue or deliver policies or contracts in the state of New York. Guarantees are backed by the claims-paying ability of the issuing insurance company. Products may not be available in all states and product features may vary by state.

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. For legal, accounting or tax advice consult the appropriate professional.