



# 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.

#5020015688 🕒 0 Days Pending

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

Requirements

**Workboard** ←

Case Details

Contact History

Application History

Inbound/Outbound Comms

Amend Application

Pending

Lab Lift Program  
Provide program acceptance  
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 384 Days Pending Read-Only: This application is currently read-only. [View Log](#)

Darcy Burge - \$200,000 | Male | Age 46  
 Product: OPTerm20 | Application #: 1000006113  
 Signed: 06/24/2022 | Application Method: Digital  
 Total Active & Pending Face Amount: \$600,000

Application Tracker

Workflow: New → Application Started → Application Signed → **Further Guidance Requested** → Underwriter Review → Decision → Offer Made → Offer Accepted → Paid → Active

Requirements

Workboard

Case Details

Contact History

Application History

Inbound/Outbound Comm

Amend Application

Pending

Lab Lift Program  
 Provide program acceptance  
 Created: 06/24/22 10:56 am

Action Needed

Completed

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#5020012756 384 Days Pending Reopened Read-Only: This application is currently read-only. [View Log](#)

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

Workflow: New → Application Started → Application Signed → **Further Guidance Requested** → Underwriter Review → Decision → Offer Made → Offer Accepted → Paid → Active

Requirements

Workboard

Case Details

Contact History

Application History

Inbound/Outbound Comm

Amend Application

Pending

Action Needed

Completed

Agents Appointment  
 Agent: 0200000 is not appointed.  
 Created: 05/22/22 12:27 pm

ReOpen Requested  
 Review ReOpen Application  
 Created: 05/13/22 12:34 pm

ReOpen Requested  
 Review ReOpen Application  
 Created: 05/13/22 12:28 pm

Medical Return  
 Test  
 Completed: 05/22/22 01:55 pm

- 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.