

FIELD ACCESS TO INFORCE ILLUSTRATIONS



The Producer Quoting Application is a tool that allows agents to run their own inforce illustrations. This helps provide better ongoing service to your existing policyholders. Follow the steps below for helpful information on where to find it and basic instructions on how to use it:

Steps to access our inforce illustrations

1. Go to the Mutual of Omaha Sales Professional Access inforce illustration website page:
illustrations.mutualofomaha.com/reproposals
2. Enter your Mutual of Omaha email address and password
3. Select the *Sales & Marketing* tab, followed by the *Mobile & Online Quoting* option
4. The Producer Quoting Application will display at the bottom of the Mobile & Online Quoting page
 - a. Select *Start Re-proposal App*
 - b. A screen will appear that asks for the policy number to get started
 - i. Enter a policy number and click *Submit*
 - ii. The policy information will then appear. To run the inforce illustration, edit the applicable fields that are displayed
 - iii. The *Settings Wheel* icon in the upper right-hand side of the window displays the current policy information for the producer. The producer may edit the fields shown in the window based on their preference (no actual policy information is changed in the Settings Wheel window). When you have finished editing the chosen fields, select the *Close X* option

Tip: As you move from one information field to the next, a Help box will appear to the right of the screen for assistance and guidance.

When you are ready to solve for the required premium:

1. Select *Solve For* from the drop-down list
2. There will be additional fields that are editable, including the *Premium Solve* drop-down list
3. Information and additional edit boxes will be required based on the solve scenario that is selected
4. Once all information and policy parameters have been entered and updated, you can select *Calculate* from the bottom of the screen

This new application then calculates based on the inputs to create the inforce illustration. These new inputs are included on the Client Input Summary pages located at the end of the inforce illustration

Important Notes

- You must be the writing agent of record to access this function, servicing agents cannot run inforce illustrations
- Previous inforce illustrations are saved in the list for up to 14 days
- Chrome is the recommended browser

We're here to help

For general inforce illustration questions, contact Policyowner Services at 1-800-775-7894.

For technical/functionality questions or feedback, email pqa.support@mutualofomaha.com.