eApply User Guide

firelight

Ameritas
fulfilling life.

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Accessing eApply

To access eApply, open a web browser and login to **Producer Workbench**.

1. You can find the link to eApply in the **Day-to-Day Tasks** by selecting **Go to eApply**. *Agents must first be appointed before they are able to access eApply.*

2. The next screen will require the agent's number, and you will be taken to your eApply home page.

Agent:
John Smith - AG000000000   Login

eApply simulator

You can access our eApply simulator to practice using the system.

1. You can access this from the **Prepare for a Sale** page by selecting **About eApply**.
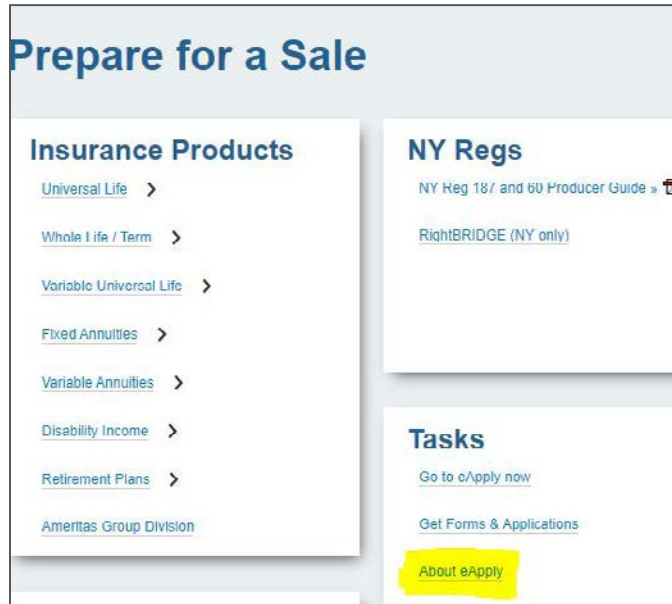
2. Here you have access to resources and training videos, as well as the simulator. Select the **Test drive eApply using our simulator** link. The login information is located below the link. *This is a shared environment so do not use actual client or personal data.*
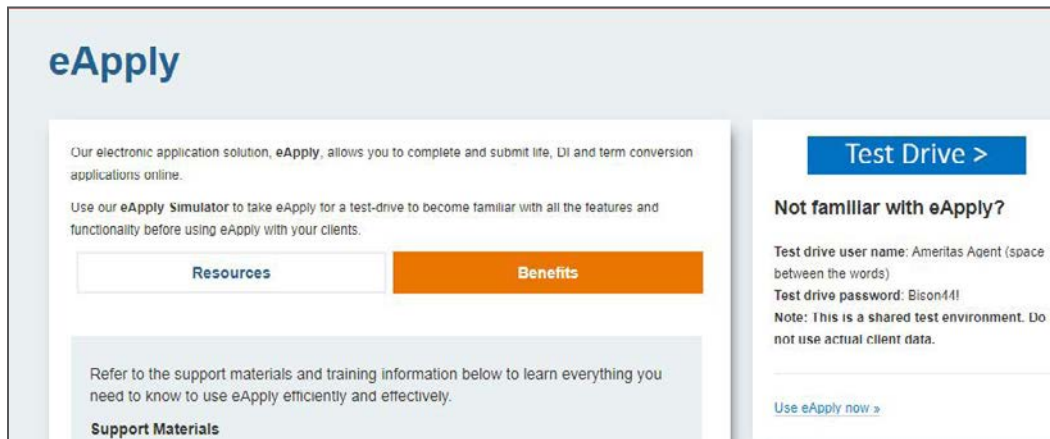
eApply home page
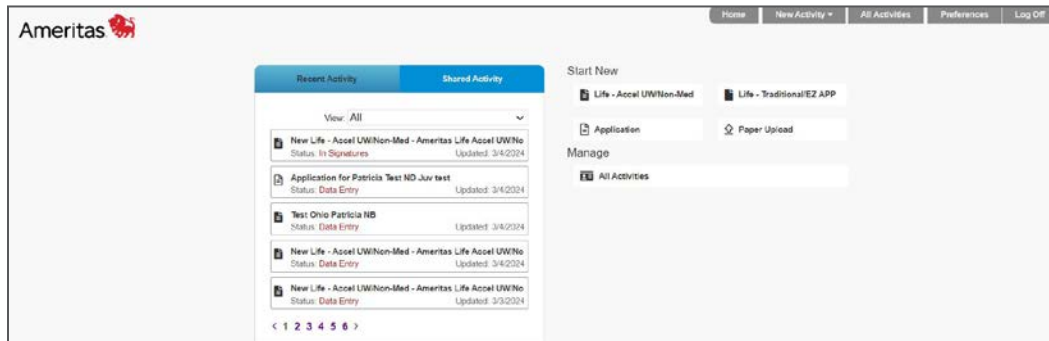
Once on the eApply Home Page, you will be able to see the following:

Recent Activity:

Lists the 5 most recent applications started. You will also be able to see the status of each application.

Activity Display Statuses:

Application Locked – When Data Entry reaches 100% and the activity is ready for signature and review processing.

Checked Out – When an agent checks out an application from the FireLight web server to the FireLight Console to do offline editing. FireLight locks the application so the agent cannot edit the application in the FireLight web program.

Client Request Complete – Shown with Client Fill or Client Fill & Sign when the client has completed the request and sent it back to the agent (note: application may not be 100% complete).

- On a Client Fill request (or on a Client Fill & Sign request prior to 100% complete), when the client clicks or taps **Complete/Logoff** followed by **Submit and logoff**, the status proceeds to Client Request Complete, then to Data Entry for the agent to complete the order.

- On a Client Fill and Sign request, prior to 100% complete or signature, when the client clicks or taps **Complete/Logoff** followed by **Submit and logoff**, the status proceeds to Client Request Complete, then to Data Entry for the agent to complete the order.

- On a Client Fill & Sign request, once the application reaches 100% and the client clicks or taps **CONTINUE** or **Sign Application** from the menu, followed by OK to lock the application, status is set to Client Request Complete followed by Pending Signatures. Next, when the client clicks or taps **Sign Application**, the status changes to In Signatures. Once complete and client has logged off, the status typically remains In Signatures, assuming the agent still needs to sign.

Complete – Normally triggered when the transmission of the application to the back-office system successfully completes. This is the final status prior to being purged.

Data Entry – When an agent creates a new activity, creates a copy of an existing activity, or unlocks an activity.

In Signatures – When one or more signatures are complete, but one or more signatures are still outstanding. If the email signature request expires, but one or more signers have completed the signature process, the status will remain In Signatures.

Pending Client Request – When a Client Fill or Client Fill & Sign request is sent and is pending client completion. If the client clicks Complete/Logoff followed by Save – Finish later, the status remains at Pending Client Request.

Pending Signatures – When a user clicks or taps Use e-Signature. This is one status for all signature types (e.g., owner and agent). If the email signature request expires, the status remains in Pending Signatures if no other signer has started the signature process

Pending Transmission – Triggered when review is complete (if applicable) or the user clicks or taps Submit when there is no Review Queue, or if the user clicks or taps Decline eSign and it should be transmitted (no Review Queue), or Rejected from a Review Queue and it should be transmitted. If the transmission fails, it stays in Pending Transmission until it successfully transmits to all endpoints.

Signatures Complete – When all signatures are complete. Stays in this status until the user clicks or taps Submit or Review Queue if there is a manual (pre-submit) review queue.

Submit Requested – When an activity is pending submission. This applies to the review queue and to activities after the review queue or bypassed the review queue process.

In Review – When a reviewer locks an application order in a Review Queue; when multiple simultaneous review queues exist and a reviewer locks the application order in any of the multiple review queues; when multiple sequential review queues exist and a reviewer locks the application order in the first review queue, also remains In Review status when a reviewer approves the application order, and it moves to the next sequential review queue, regardless of whether it is locked or not. Remains in In Review status if the reviewer clicks More Info.
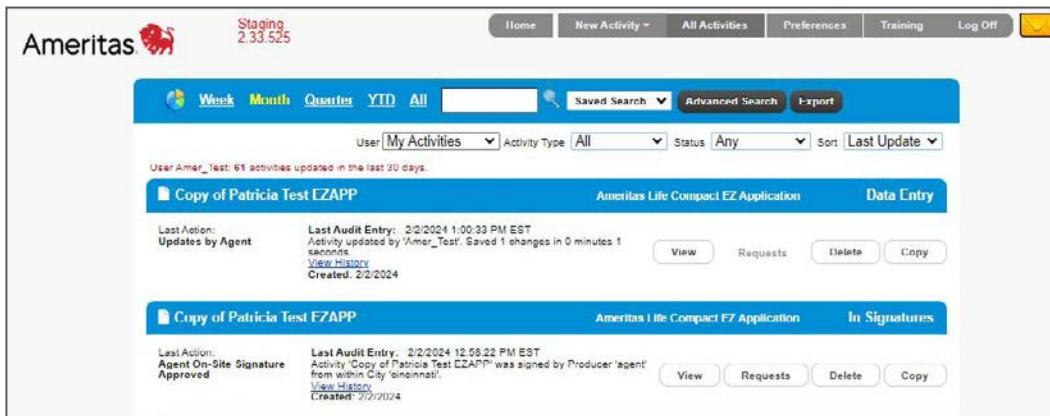
Navigation Bar:

The navigation bar allows you to log off, view any messages, and has the following available features:


All Activities:

Clicking this will take you to a list of all applications.

From here, you can see the status of each application, as well as more details about the last action taken, and the created date. The functions on this page are:

- **View** – Click this to go to the application.
- **Requests** – This is available only when there is a pending request that was sent to the client to complete signatures or the application.
- **Delete** – This will delete the application out of the system. (Note: this does not delete them from our system if you have completed the application and sent it to us for issue.)
- **Copy** – This allows you to take an already-created application and duplicate it. This is useful in situations such as the client previously applying for a Whole Life policy but then decides to do a DI application. It will pull the information into the application.
  - When you select copy, you will have two options. Copy as is or copy with changes.
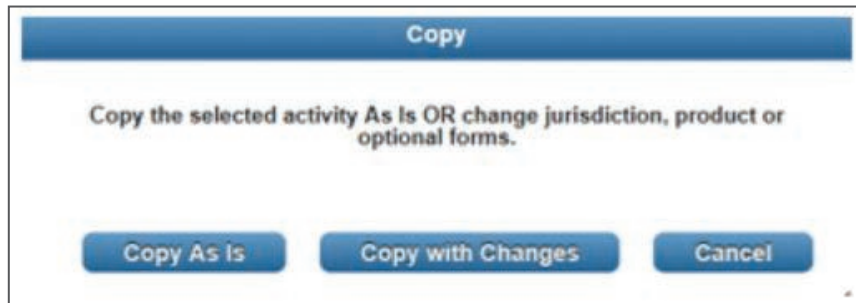
  - **Copy As Is** will create a new application using the same state and same product type.
  - **Copy with Changes** will prompt you to select the state and product type.

Home – Return to the home page from any page you are in.

New Activity – This will take you to create a new application.

Preferences – Here you can change some default preferences, add Mobile Access and set your Redtail username and password.

Log off – To close and log off FireLight, click Log Off on the navigation bar. A message indicates that you have successfully logged out of the application.

Start by Selecting the Correct Application

To start a new application, you can either choose the application needed under **Start New** on the eApply Home Screen or **New Activity** found on the Navigation Bar
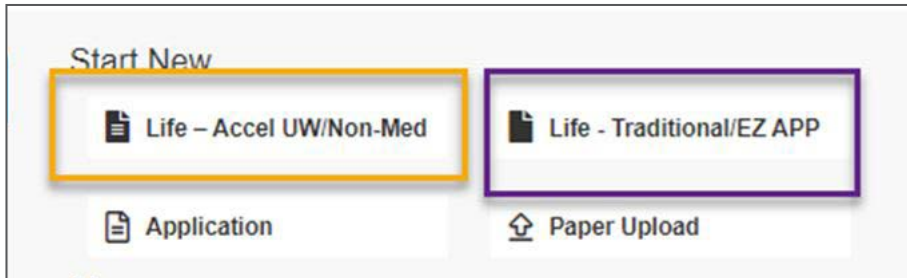
Start by selecting the appropriate option to begin your eApply application. You will then be prompted to select a jurisdiction from the dropdown list. This is used to make sure the correct application pages that are required for that state and product are included.

- **Life – Accel UW/Non-Med** – is used for accelerated underwriting, juvenile cases and non-med (insured over 18 but face amount less than $100,000) for life insurance applications in all states (not available in New York).

  – This is a 2-step process as the HIPPA authorization is at the front of the process and must be signed before launching underwriting questions.

  – This allows Ameritas to order data tools at the same time the application is being completed.

  – The Lifestyles and Health sections have reflexive, drill down questions which allows Ameritas to gather more information during the application process to try to make a decision at the time the application is submitted. If the client does not qualify for an instant decision, the client will be given the opportunity to continue with full underwriting.

- **Life-Traditional/EZ App** – is used for teleunderwriting and traditional underwriting life insurance applications (not available in New York)

  – Traditional Underwriting – Insured over age of 18 and face amount over $100,000
    - If Ameritas orders medical requirements, have the ability to schedule the Paramedical exam within eApply either thru APPS or ExamOne and can choose a day and time for their exam. These orders will seamlessly connect with the Ameritas underwriting system so results will connect automatically when completed.

  – Teleunderwriting – Insured is over age of 18 and face amount between $100,000 and $5,000,000.
    - Ameritas will order all medical requirements thru APPS.

- **Application** – Select this option to complete annuity, life application for NY, low band, disability, combo or term conversion.
  - **Annuity** – used when applying for Income 10 Indexed Annuity or Accumulation 7 Indexed Annuity (not available in New York)
  - **Life Insurance** – used when applying for Value Plus WL Low Band (10,000 to 24,999), Ameritas Life Insurance - NY only for Whole Life, Universal Life and/or Term
  - **Disability** – Used when applying for any Cornerstone, Foundation or Fundamental Disability product
  - **Combo** – Used when applying for both a Life and DI product for the state of New York only
  - **Corporate Forms** – Used when applying for a Term Conversion

Life – Accel UW/Non Med

Select this option to complete an accelerated underwriting, juvenile cases and non-med (insured over 18 but face amount less than $100,000) for life insurance cases in all states (not available in New York).

The HIPPA authorization is at the beginning of the application in order to facilitate the ordering of data requirements earlier in the process in addition to these advantages: .

- Potential for immediate decisions for our accelerated underwriting cases (if the client qualifies).

- By getting data requirements early, including prescription history, we can in some cases have the system automatically question when there appears to be a discrepancy, and speed up or eliminate the need for back and forth between underwriting and the agent/client.

- The combination of getting questions (including reflexives) answered and the data tools allow for a more consistent and potentially quicker underwriting process

1. Select **Ameritas Life-Accel UW/Non-Med application – Step 1 of 2 (HIPPA Authorization and Main Application Details)** after selecting Jurisdiction.

   - Application will be completed beside the Life and Health questions and during signing ceremony only the Authorization for insured will be signed.

   Once the application is created, the Jurisdiction cannot be edited. The way to change the Jurisdiction will be to Copy the application.

2. Once a product and jurisdiction are selected, the next screen will take you to the Required Forms page. This is a list of forms you will be prompted to complete.

    From here, select **Create**

Enter a name for the application in the pop up box. It is recommended to include the client's name when naming the application, as this will be what displays on the home page under Recent Activity and in the list of applications in the All Activities page.

3. After clicking **Create**, the Application Wizard Screen will appear.

4. On the Case Cover Wizard Application Type will be decided.

  • Accelerated Underwriting – Automated Underwriting Engine

    – Insured's age must be between the ages of 18 and 50, the face amount must be between $100,000 and $2,000,000.

    – Insured's age must be between the ages of 51 and 60, the face amount must be between $100,000 and $1,000,000.

  • Full Application – Automated Underwriting Engine

    – Insured's age must be over 18 with face amount between $25,000 and $99,999

    – Insured's age must be between 0-17

5. When all required fields are completed, the Data Entry percentage complete indicator on the status bar displays 100%, eApply automatically saves the activity, and a notification appears.
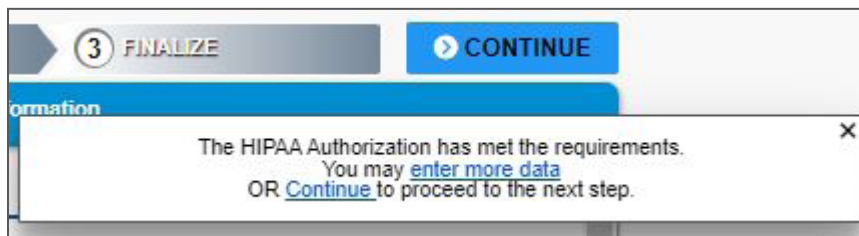
6. Click Continue to lock the application from any changes being made and move to the Signature Process.

  • The only signature being captured at this point will be the Insured's on the Authorization page only .

7. Once the Insured has signed the Authorization –click **Apply**.
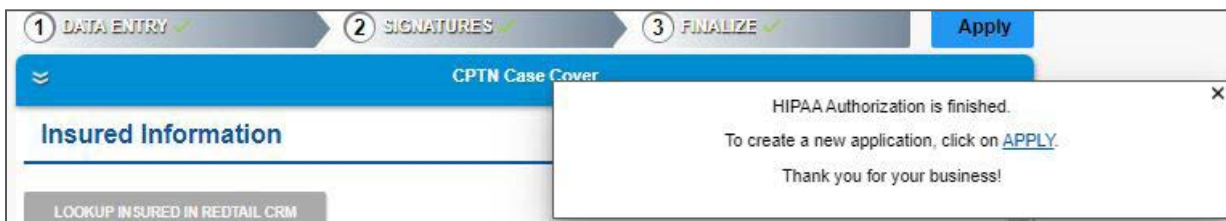
8. After clicking Apply, select – **Ameritas Life – Accel UW/Non-Med application – Step 2 of 2 (Health and Lifestyle Questions and Final signatures)**
   - Data from Step 1 is copied over to Step 2 and complete necessary Health and Lifestyle Questions.
   - The case could have a decision or let you know the case is being referred on the Underwriter Consideration Screen.

9. All the data entered can be edited in Step 2 except for the Insured's name, Date of birth and gender
   - These fields will be grayed out on the case cover
   - If name change is needed, go back to Step 1 and Copy Activity
     – Step 1 will have the **Copy Activity** under **Other Actions**
     – Step 2 will not be able to be copied

10. Health & Life Questionnaires will need to be completed.
    - To launch the underwriting questions – click blue button **Complete Health & Lifestyle Questionnaires**

11. Underwriting questions will launch and the reflective questions will need to be completed.

- Complete all of the underwriting questions. When all questions have been completed on the screen, the bubble next to the screen name will be filled in green

- After completing all questions and clicking **Close** the system/back office response will provide a status message in red.
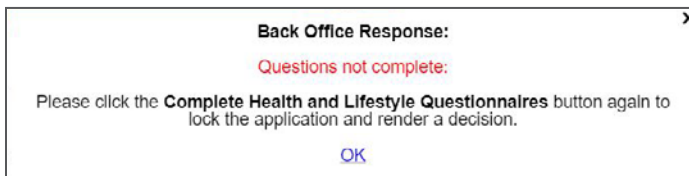
12. Once all questions have been completed all data that have been entered within the application will be locked.

- If data needs to be edited within the application – on the Health & Life Questionnaires screen, click blue button **Unlock Pre-Underwriting Application Questions**.

- The Underwriting question will not be cleared out

- Once the edits are complete, return back to the Health & Life Questionnaires screen, click blue button **Complete Health & Lifestyle Questionnaires**

- When the Under Question window relaunches — click **Close** and the application will return back to locked
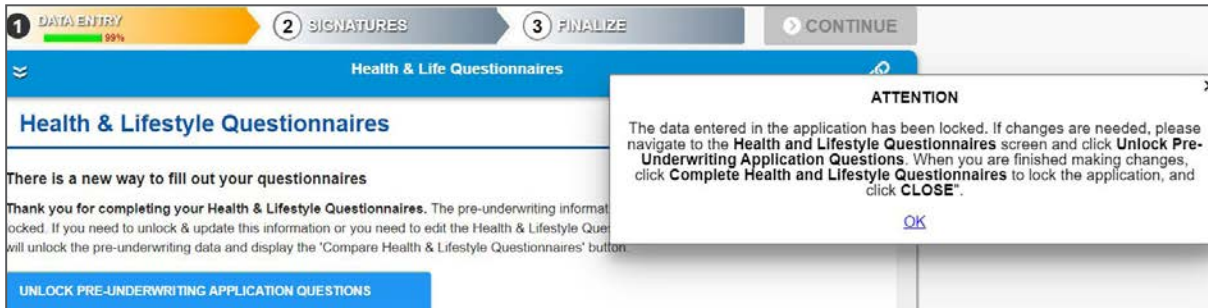
13. On the **Underwriting Consideration Attention** screen a message will display advising if the application needs to be referred or if the insured does not qualify for accelerate underwriting

- In this example, the message advised an Underwriting decision
  - Click **Yes** – move on to finish the application.
  - Click **No** – Application will not be able to be finished and will be withdrawn.
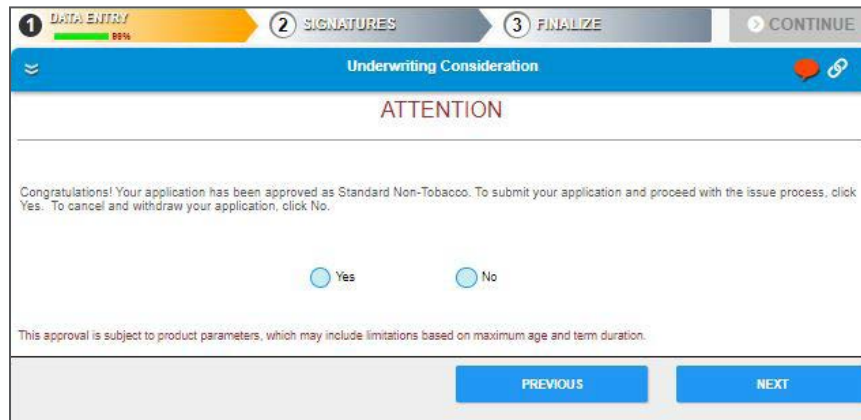
- In this example, the message advised that the case was referred to an underwriter to review before making a decision
  - Click **Yes** – move on to finish the Application
  - Click **No** – Application will not be able to be finished and will be withdrawn
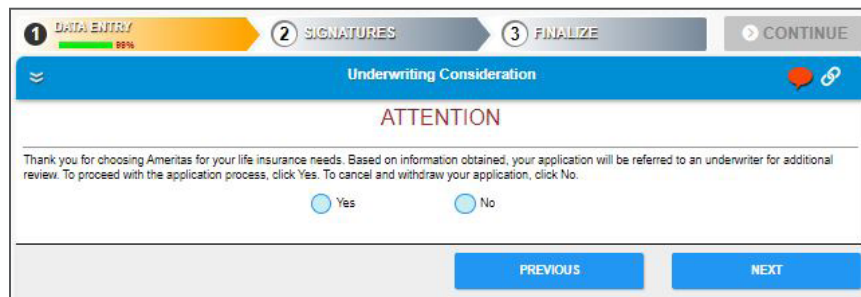
- In this example, the message advises that the insured does not qualify for accelerated underwriting and it is being referred to underwriting to review before making a decision.
  - Click **Yes** – move on to finish the Application
  - Click **No** – Application will not be able to be finished and will be withdrawn

14. Paramedical Scheduling

If the case has been referred and **Yes** was selected on the **Attention** screen to continue you can schedule paramedical thru ExamOne or APPS.

Question – Would you like to order a paramed exam at this time? – if answered Yes then can continue to select the vendor, date and time for the Exam.
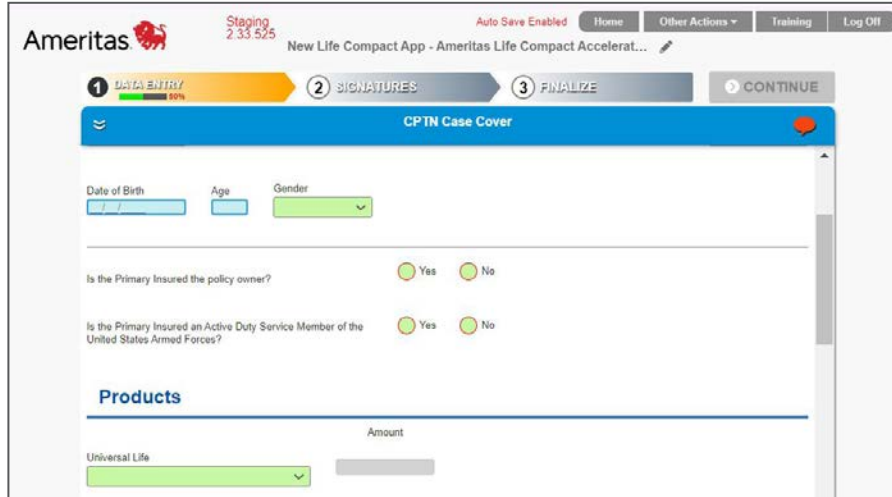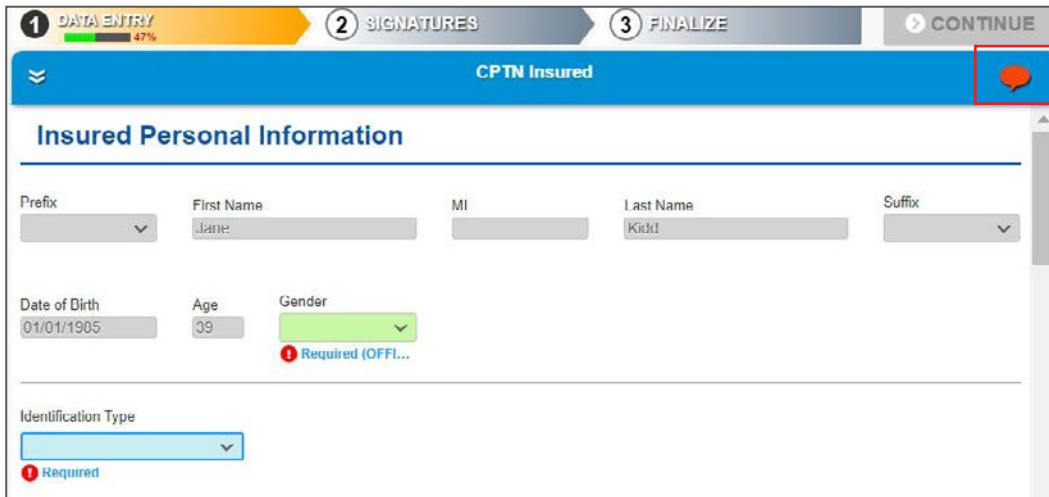
Wizard screen features

Currently our life and disability add and annuity product applications are in a "wizard" type format. This means that only the questions that need to be answered are pulled in, based on how you answer previous questions.

Required Form Fields: Required fields will be highlighted in blue or green. Green fields can only be completed or edited by the Agent while blue fields can be completed by the Agent or Client via Client Fill or Client Fill and Sign.

All white fields are optional or if was required was satisfied.

Display Instructions Balloon: The red balloon in the upper right corner will highlight and display instructions on any fields still required on that page when you click on it. That balloon will not disappear until all required fields on that page are completed fully and accurately.

Tooltip Text: When you click into a field, a tooltip text will populate and aid in formatting instructions for that field.
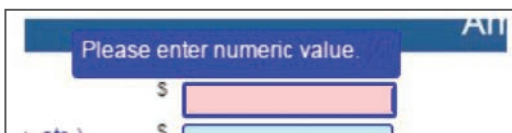
Screen Controls: You can use the following navigation tools to get to other sections of the application. You can jump through several pages filling in information as it becomes available.

> You do not need to complete the form pages in sequential order.

• Click the previous and next blue boxes on the page to move through the pages of the application.

• For improved visibility, the position of the wizard scroll bar is on the right of the data entry area and a scroll indicator icon appears next to the scroll bar when data is below ⊕ or above ⊕ the visible data entry area.

• Click the double down arrows in the top left corner of the blue header under **Data Entry** to view all the wizard screens. Sections with the 🗋 do not require any additional information to be entered. Sections with the icon ⚠ still require information to be completed. You can jump to a section by clicking on it or you can click the arrows again to close this list.

Percentage Complete Indicator: In the upper left corner, there is a percentage complete indicator. This will display the percentage of completed required data in the application to meet the minimum amount of information to get to complete status and be able to capture signatures.

If you click on the percentage indicator, you will get a list of required fields that remain to be completed. Click the X on the lower left corner to close the required fields list.
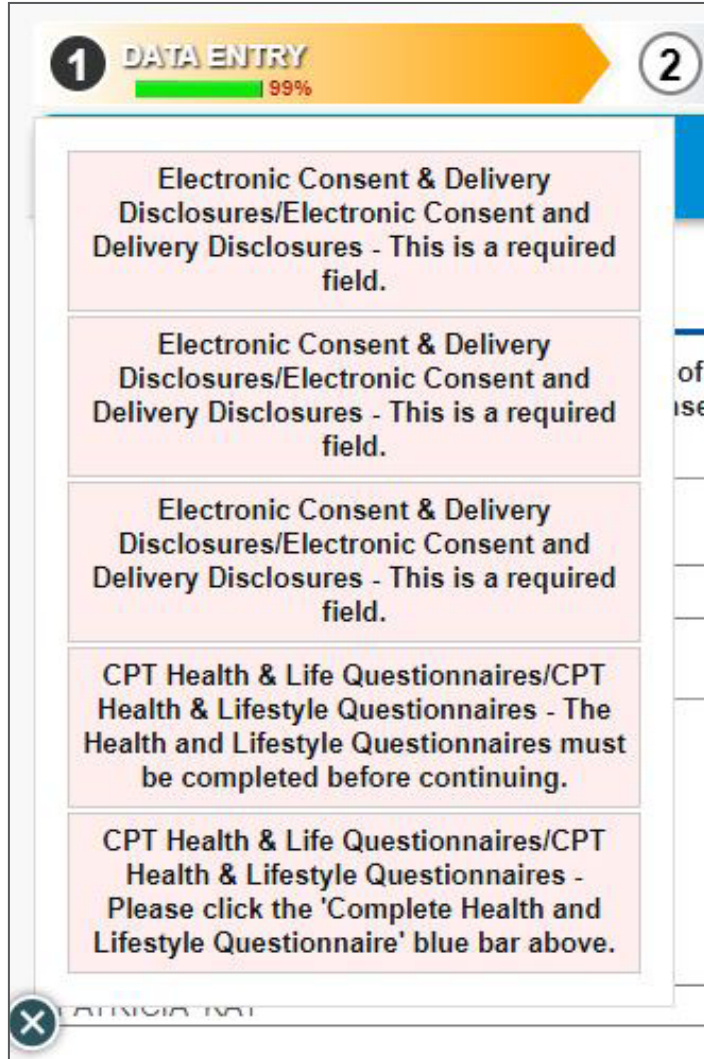

Application Navigation Bar Features:

Save: if you do not have all of the information to complete the application, Firelight Auto Save can save your progress and then return to the application as often as necessary to complete the application. Firelight stores saved activities for up to 6 months. Click on activity in the **Recent Activity** list on the Home page or click **All Activities** on the navigation bar to access the saved activities on the All Activities page.

• **Other Actions:** Use the other actions menu to perform additional tasks such as:
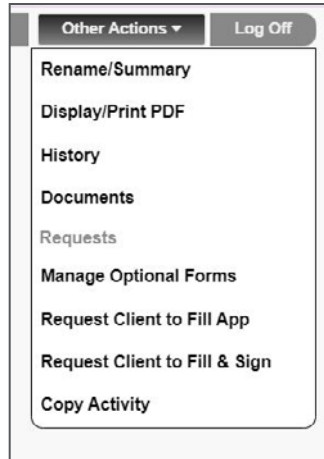
– **Rename/Summary** – This pulls up a small window that shows the name of the application. You can rename the app in this screen by typing your changes in the Application Name Box and then clicking the save button in the right corner. This screen also displays other information pertaining to the application as seen below:
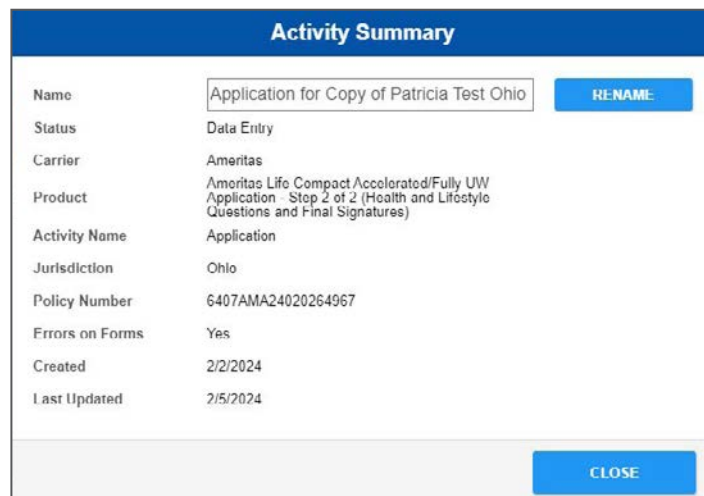

- **Display/Print PDF** – This task allows you to view, save and print selected documents from the application package by clicking Print Selected Documents.
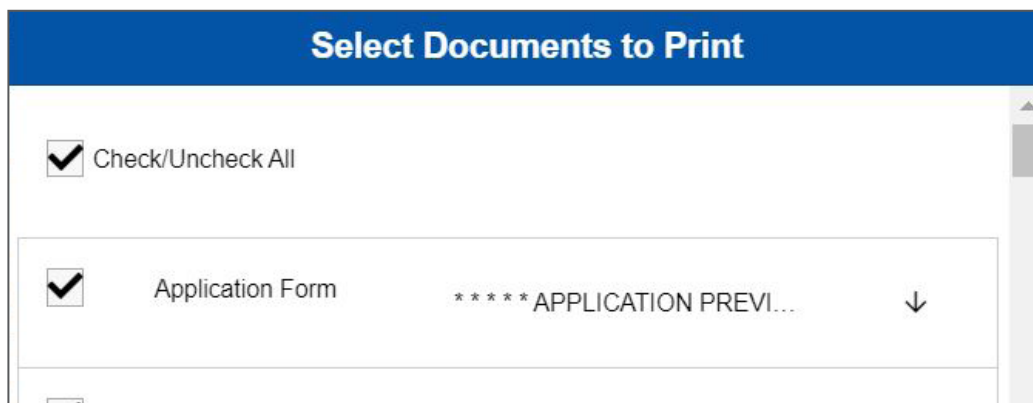
- **History** – This task allows you to view the history of the application as shown below.

- **Documents** – This task allows you to attach additional documents to the application from your computer. Here you can add things such as exams, illustrations, or any other documents you feel need to be attached.
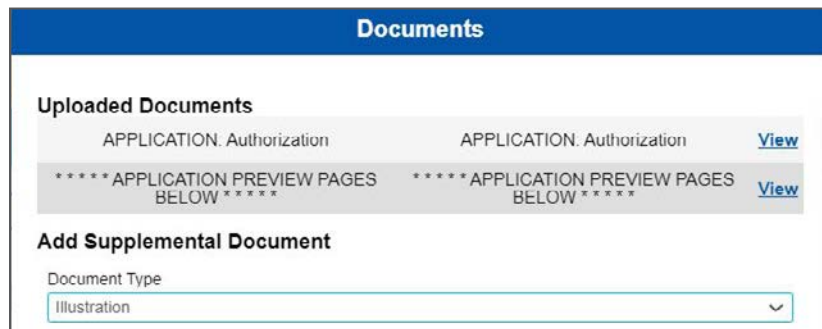
- **Requests** – This feature lists all the completed or outstanding requests for this application. Use the Requests feature to view any signature request or requests for the client to complete the application. In the Application Requests screen, click cancel to cancel and remove any pending requests.

- **Request client to fill app** – allows the client to supply missing information for required fields. When the client clicks or taps Complete/Logoff followed by Submit and logoff, the application goes back to the agent.

- **Request client to fill & sign** – allows the client to supply missing information for required fields and to sign the completed application in one session.

The application goes back to the Agent after it is signed by the client or if they choose to Complete/Logoff the application.

- **Copy Activity** – Within an activity on the Other Actions menu, click Copy Activity to make a copy of the open activity. Enter a new name for the copy of the activity and click OK on the Copy Activity dialog box for the applicable activity. The copy is saved to the **Recent Activity Tab** list on the Home page and to the **All Activities** page.

Request client to fill application

Use the **Request Client to Fill App** function to send an email to the client to request information to be completed.

1. On the navigation bar, select **Other Actions** and then click **Request Client to Fill App**. The system populates the matching fields with the data that you added to the activity

2. On the Left side of the email request screen, first select **Signer Type** and then fill in the **Recipient Name, Recipient Email, Your Name** (agent's name to display in the email that is sent to the client), **Your Email** (agent's email), **Client Last 4 Digits of SSN**, and **Client Birth Date**. (DOB and SSN are required here for client verification purposes).

3. Once all fields are completed, you can see the system-generated email on the right. You can click in this and make any changes to the **Subject** or **Message** fields if needed.

4. Click **Send Email Request**, and the system will automatically send an email to the client with a passcode for verification purposes, and a second email with the link to the application.

5. Click **Generate Link Without Email**, feature allows the agent to generate a link to a firelight website link and displays it at the bottom of the page. This allows the agent to copy the link and paste in their own email or send via phone or text.

Client to fill app (client steps)

The client will receive an email with a link to the application. (See below example).

1. The client will select the blue underlined Link, and the application system will open in their internet browser.

2. They will be asked to enter the last 4 digits of their social security number and date of birth to access the application (must match what the agent entered on the email request page). Or, they can verify their identity by entering the **Passcode** provided in the first email sent to the client.

3. Once client has successfully signed in, they are now able to complete their information.

4. If client clicks on Alerts, they will get a list of required fields that remain to be completed. Click the X on the lower left corner to close the required fields.
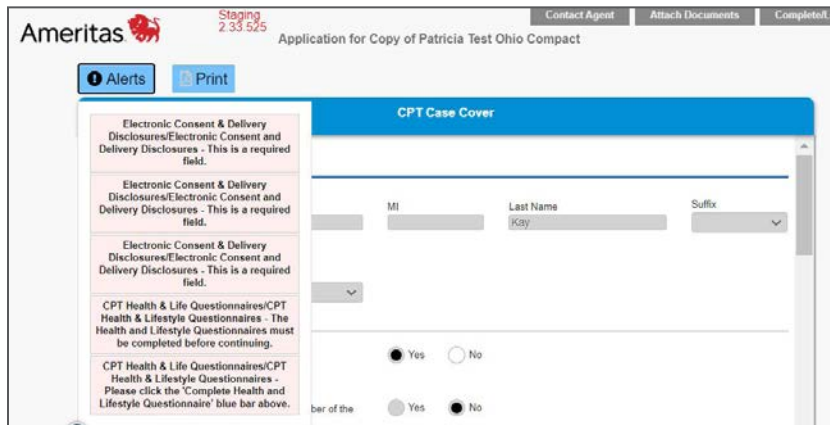
5. They will then get a pop up window with the option to **Submit and Logoff or Save – Finish Later**. While the client has the application, the application is locked and not able to be changed by the agency. **Before the application can be unlocked for the agent to make additional changes or see what the client completed, the client must select Submit and logoff.**
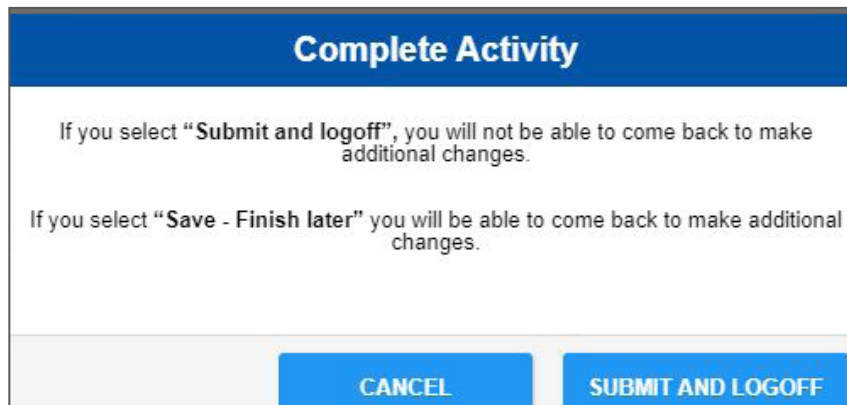
6. Once they submit and logoff, they will get a message saying their actions are complete and no further steps are needed. The agent will now be able to access the application once they login to eApply.

Pending request

Agents can view any pending request that has been sent to the client and send reminders.

- When a request is pending, the agent will receive a **Pending Request** notification window (below).

- The agent can use **Send Reminder to {client name}** to send an email reminder to the client that they have a pending request. The link to eApply will be in this email as well.

- You can also **Send Passcode to {client name} Cell Phone** or **Send Passcode to {client name} Email**. This creates a new passcode in case they cannot verify using their social and DOB and have misplaced the Passcode originally sent.

- You also have the option to **Cancel this Request**. When you click on this option, you will get a confirmation dialog asking if you are sure you want to cancel the request.

Unlock application

When a request has been sent to the client to complete the application or the signing process has been begun, the application is locked from being revised.

Unlocking an activity will revoke all previously captured signatures for the activity. When an activity is in review by a reviewer, the agent cannot unlock the activity. When a form or wizard activity status is "In Pre-Submit Review" or "In Review", the Unlock Application (forms) and the Unlock (wizards) option is disabled on the Other Actions menu. When an activity is locked by the reviewer and the application is opened by the agent/user in FireLight, a message appears with text, "Application is locked for review."

• The boxes will be grayed out when they are locked (see below).

• While the application is **Locked**, you can unlock the application by going to **Other Actions** and selecting **Unlock Application**. This feature only shows in the other actions menu when the application is locked.

• When you select to unlock an application, you will get a warning message. Any signatures or information entered on the client's end will be lost and must start from the beginning of the process again.

Signatures

In order for the Data Entry to get to 100% to move to signatures, need to select Accept e-signature under Electronic Signature Consent.

When an application reaches 100% complete, a pop up ask if you want to **enter more data** or **continue** to the next step.

1. Clicking **Continue** will lock the application from any changes being made and move you to the signature process

2. When using E-Signatures, the next screen will display a list of required signatures. You can obtain the signatures in any order. The agent's signature can be done before or after all signatures are done. **Note:** The application will be locked upon making the choice to use E-Signatures. If you need to unlock the application for additional information, you will have to unlock the application (see page 22).

3. Choose a method to obtain the Client's signature.
    - **Sign Now** should be utilized when the client is physically with you and is ready to sign.
    - **Send Email Request** should be used when you want to send the request remotely via email.
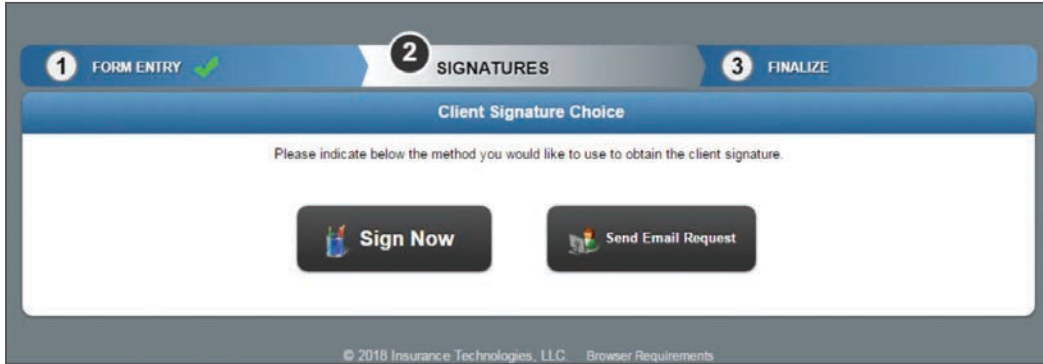
When signing now

1. After clicking **Sign Now** on the **Client Signature Choice** page, enter information in the following Agent and Client Identification Verification sections. Select a **Form of Identification** in the list and then enter client information accordingly. The Birth Date field requires the client birth date in the format mm/dd/yyyy

2. After filling in the information, click **Verified** to proceed. Click **Cancel** to return to the Signatures page without the Client signature. Click **Back to Application** on the upper right to return to the application without capturing signatures.

Signing process
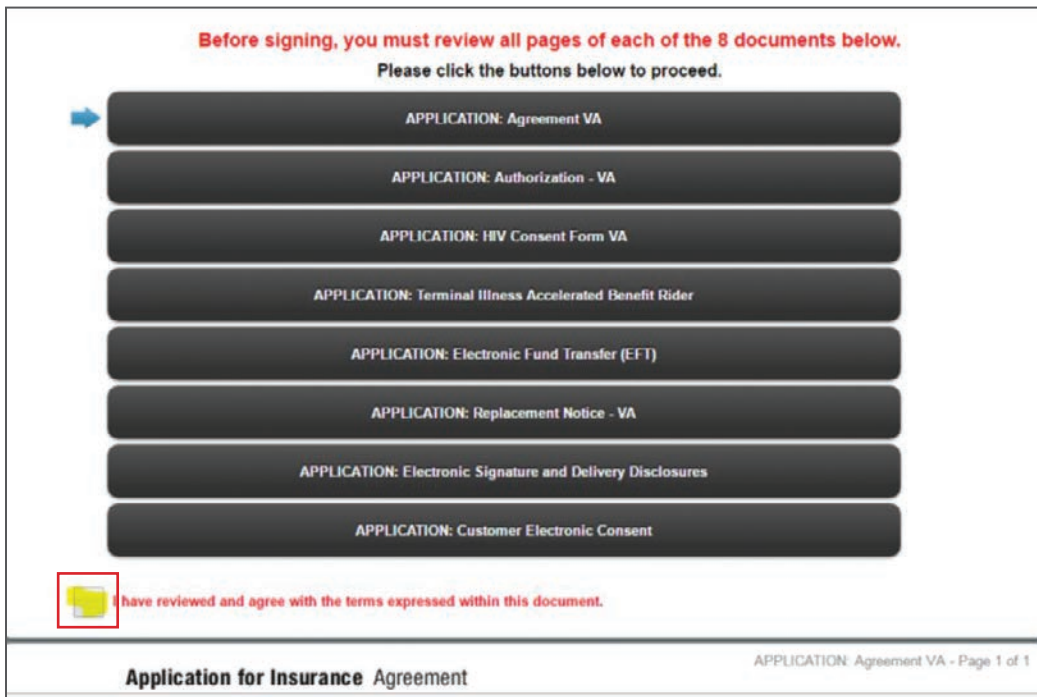
1. Before the system will allow the applicant to sign or initial a page, they must review ALL pages. If there are more than one page, you must arrow through all pages before the system will allow you to move forward.

The Client enters his or her initials in the text box on the Please enter your initials dialog and clicks **OK**. Optionally, the Client can click **Cancel** to not capture initials and halt the document review and consent process.

2. The Client clicks a document button to open the document. The Signature page displays the first form within the order's package of forms that requires the Client's signature. The Client reviews all of the pages in the document by clicking the forward and back buttons to move to the next and previous pages in the document. The Client selects the check box for **I have reviewed and agree with the terms expressed within this document**.

3. A green check mark appears next to the reviewed and consented documents.

    The Client repeats the review and consent process for all remaining documents.
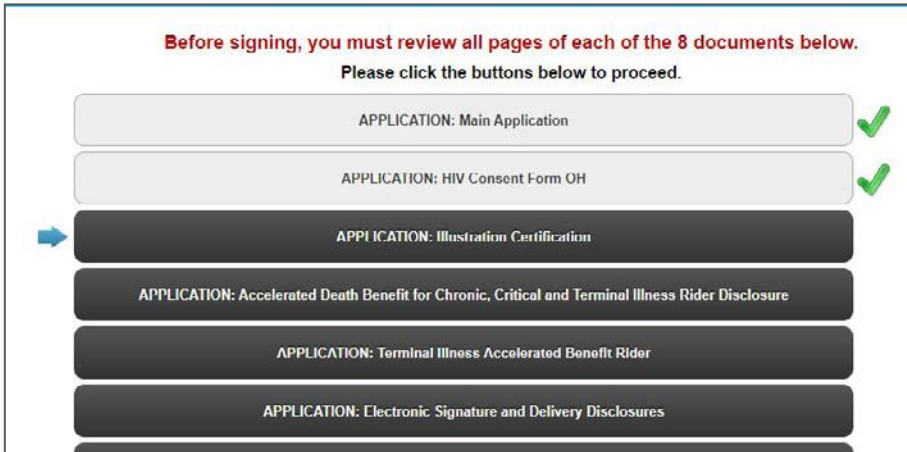
4. When the Client has reviewed and approved all documents, the Capture Electronic Signatures page opens. The Client enters their information.

5. There are two signature options. They can type their name:

6. Or they can use a stylus signature on a tablet or touch screen:

The Client clicks one of the following:

- **I Consent** to authorize the signature.

- **I Decline** to decline the signature.

- **Cancel** to cancel the signature process and return to the List of Required Signers page.

- **Clear Signature** to clear the signature and use the text script.

Email signature request

• If the client is not present and would prefer to sign using a secure web site, click **Send Email Request**.
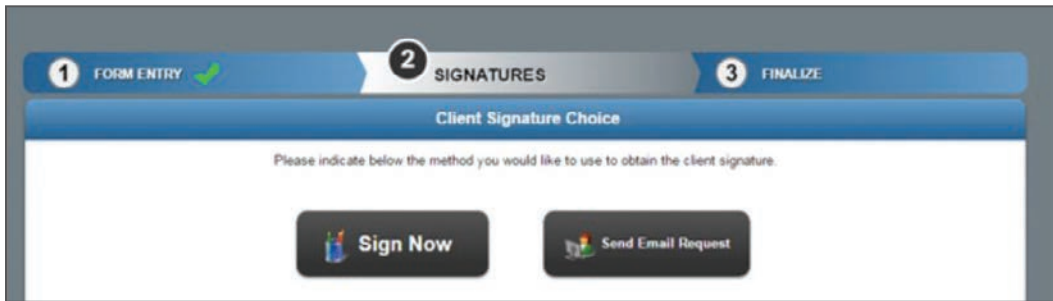

1. Next, enter information in the following form and click **Send Email Request**. In the email, the client is instructed to click the provided URL link, enter a passcode or the last 4 of their SSN and birth date to access and complete the e-signature process for the application.

   a. You can also **Generate Link Without Email** and copy and paste the link into your own created email to the client.

2. When you send the email request, the application will be locked, and a request window will display showing that request. From there you can send reminders to the client and cancel the signature request.
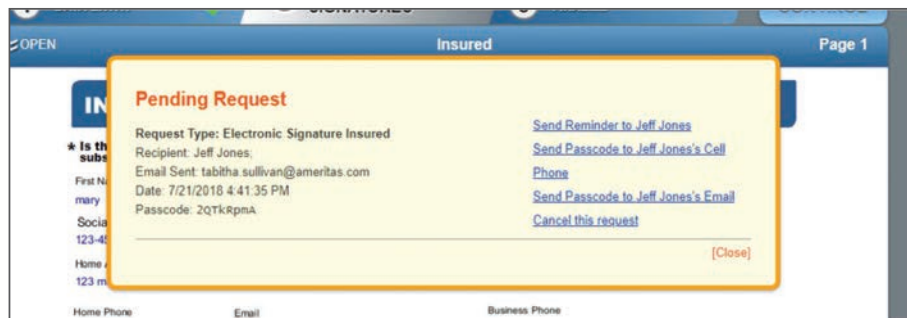
Emailed signature request (client process)

The client will receive an email with a link to the application. (see below example).
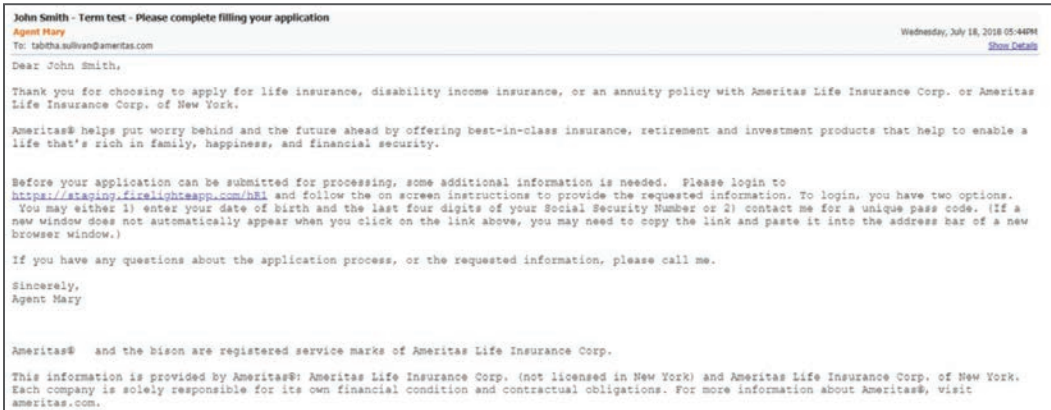
1. The client will select the blue underlined Link, and the application system will open in their internet browser.

2. They will be asked to enter the last 4 of their social security number and date of birth to access the application (must match what the agent entered on the email request page). They can also verify their identity by entering the **Passcode** provided in the first email sent to the client.

3. Once they verify who they are, they will be taken to the following screen where they can **View Application** in a PDF format, **Sign Application**, or **Contact Agent** by sending a message to the agent's **Messages**.


4. Once they select **Sign Application**, they will follow the steps of the **Signing Process** (page 24).

Producer signature

Before the application can be finalized, the producer must sign. Click **Producer** under required signatures.
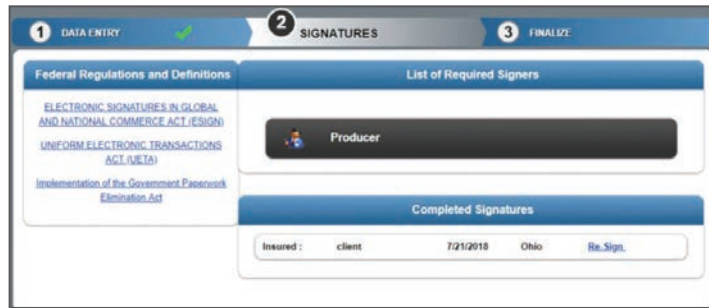
1. The producer will then be taken to the signing process. They can **Confirm all documents without reviewing individually** at the review process by checking the check box.
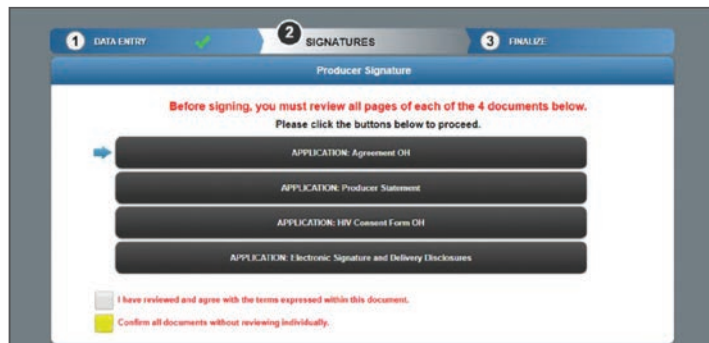
2. Next the producer will select **Sign** and be taken to the signature screen.

3. On the **Agent On-Site Electronic Signatures** page, enter the Agent information. **Agent Full Name** will get inserted into the signature pad. To override this, click in the signature block and simply sign on the pad. To clear the signature and use text script, click **Clear Signature**.

Once the signing process is complete and the producer selects **I Consent**, you will then be ready to **Finalize** the application.

Finalize and submit application

Once all signatures have been captured, you will be taken back to the application and a pop up will indicate that you have finished 2 of the 3 steps.
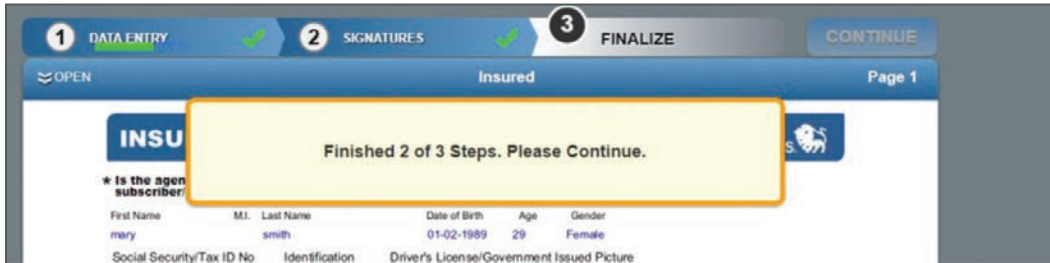
- To submit the application to the new business team, you must first finalize the application.

    1. Click on **Continue** in the upper right-hand corner.

    2. The pop up message shown below will display.
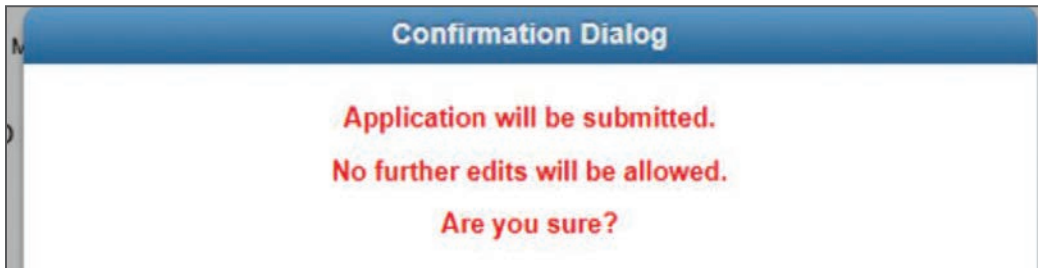
    3. Once you confirm you want to submit the application, you can select **Yes**. This will complete the application and no further action is needed.
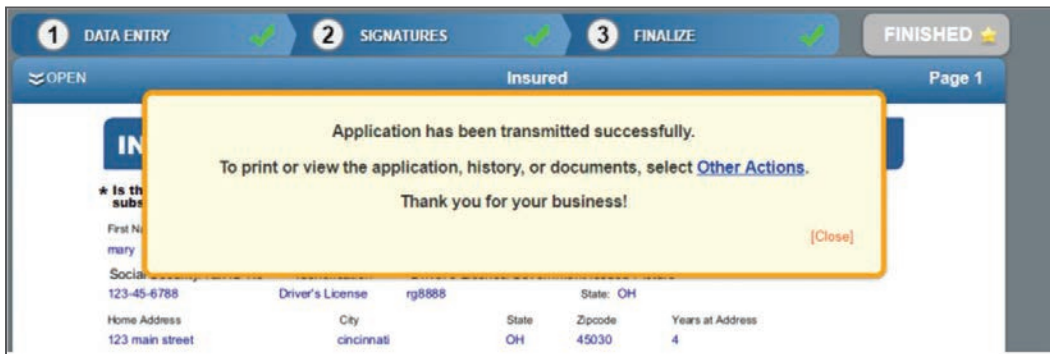
Mobile offline access

The mobile offline capability feature allows you to save an application while you're online, then access it later when you don't have internet access.

Additional Information:

To take advantage of this feature, you will need to install the Firelight software. Firelight software is available for windows only – not Apple or MAC. Once installed, you can access the offline portal from your computer start menu – All Programs > Insurance Technologies folder > Firelight Console.

You must first start the application while online, then save it. You can then "check it out" to use in the offline mode. You can send the completed application to us electronically, using your normal process, once you return to an online environment.

The following information provides instructions to install Firelight, add multiple devices and reset passwords.

Installation Instructions

Follow these step-by-step instructions to install the Firelight Console to your device (tablet, laptop, etc.) and enable you to work on applications while you are disconnected from the Internet.

Login to eApply then click on "My Preferences."

1. Click or tap the **Add New Device** button to get an Access PIN.
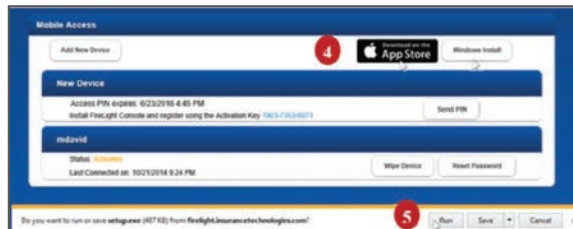2. Click or tap the **Send PIN** button.

3. Enter your **Name** and **Email** and click or tap the **OK** button to send the Access PIN to your email address.
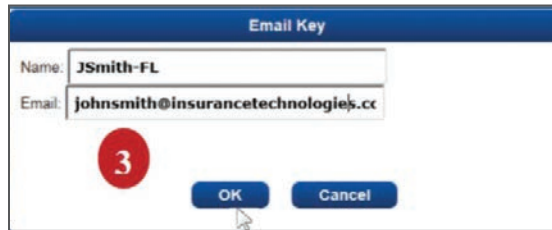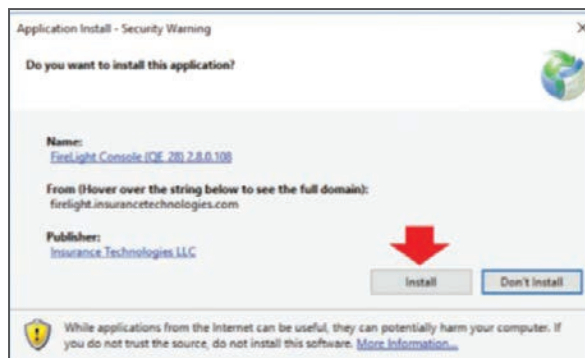

4. Click the **Windows Install** button.

5. In the notification bar at the bottom of the FireLight window, click **Run**.

6. On the Security Warning dialog box, click the **Install** button.

7. Enter the **Access PIN** (sent to your email) and the **Device Name** (name you would like to use for your tablet, laptop, etc.) and click the **Continue** button.

8. Enter an **8-digit** Password (must include at least 1 number, 1 symbol and 1 uppercase), re-enter the Password, and click the **Login** button to start the Console.

NOTE: The Password is required to log on to Firelight.

a.   If an Invalid Password dialog box appears, click OK to close the dialog box and then enter a valid

b.   Password, re-enter the Password and click the Login button.
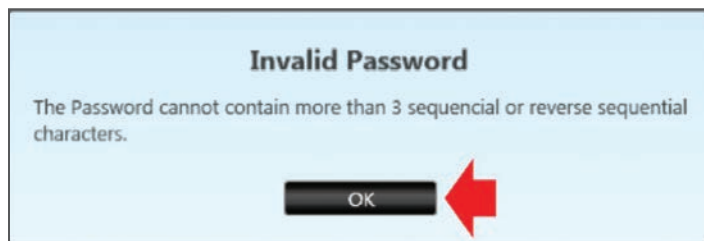
c.   FireLight starts and displays your active applications in the On Server section of the Console.
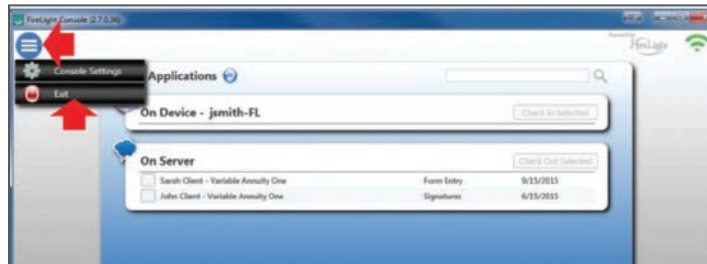
When ready to exit Firelight, click the menu button on the upper left and click **Exit**.

NOTE: In FireLight, the Mobile Access section displays the status and provides a button to enable you to reset your password.

Reset password

If you forget your Firelight Password or the Password expires, you can initiate a Reset Password from FireLight.

1. Click the **Reset Password** button.

2. Click **OK** on the Password Reset dialog box.

3. You will need to reset your Password the next time you log on.

4. The next time you log on, the following message will display:

5. You will be prompted to provide the following:

RedTail

RedTail is a web-based CRM database that can be used with eApply. If you have a subscription with RedTail, you will need to have your username and password saved under Preference.
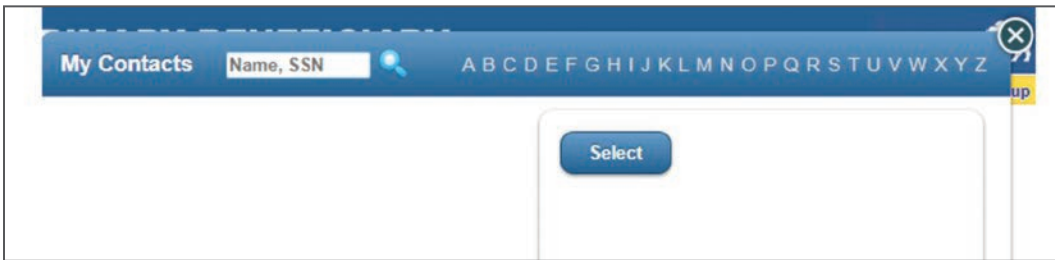
1. On the case cover page, click "Lookup Insured in Redtail CRM."

2. On any page requiring client information, the RedTail button will be in the upper right corner. You can click this link on any page requiring client info (Insured, Primary Beneficiary, Owner, etc..) and a search box window will populate.


3. Once you find your client, you can click on their name, and all their information that you have for them, that is formatted correctly, will be pulled into the application.

How to send paper applications and forms electronically

Paper applications, forms and service-related documents can be submitted electronically by referring to the instructions included in these guides:
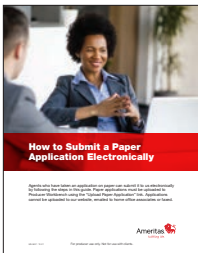
How to Send Paper Applications Electronically

(UN5621)

How to Submit a Service or Policy Change Form Electronically

(UN5682)