Manage requirements and track

To view and satisfy requirements:

Leverage either the Workbasket or the Pending tabs to manage Work Items – tasks requiring action from you.

- ☐ Go to the Workbasket or Pending tab.
- ☐ Click on the task or work item.
- ☐ Attach a form or respond to a question to complete work items.

To track the case status:

- ☐ Go to the Pending Tab.
- ☐ Click the **Policy Number**. A Case Summary screen appears.
- ☐ Click the **Requirements** tab.
  - You can view details for all requirements listed including notes and available images.

Policy delivery & reissue:

- ☐ By going to the Issued & Reported Tab you can:
  - View available policies
  - Approve policies for download
  - Request a reissue
  - Submit delivery work items

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An **Educational** Guide for Financial Professionals

Producer Quick Reference Guide: Workbench, eApplication, eSignature

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Create application

To create and submit an application

- ☐ Access the Workbench via FieldNet.
- ☐ Click the **New Application** button.
- ☐ Complete the **Application Setup Questions** (the first 4 or 5 screens depending on the contract state) in order to save the data entered.
- ☐ Click **Create Application** to generate the forms package

What happens now?

- ✓ A licensing validation check occurs within the Workbench on the Soliciting Producer.
- ✓ If there is a licensing error that needs to be resolved, an error message will be displayed. Any errors must be resolved prior to requesting an eSignature or submitting the application.

- ☐ The application package is generated and appears on the screen for you to complete.
  - – It's recommended that you take advantage of the reflexive questioning and pre-fill capabilities of eApplication as a time saver.
  - – This also serves as application data entry for the case which will make the submission process faster for the New Business Coordinator in your agency.

Tip! Once you have an application package, it is saved for you in the pre-submitted tab so you can choose to complete it in one or many sessions. Go to the **Pre-Submitted** tab and click on the client name. The Application Summary screen appears where you can resume completion of the application.

- ☐ Before initiating signature collection, access the **application summary screen** to perform the validation check to ensure the application package is in good order. The application cannot be submitted until it passes the validation check.
- ☐ At this point, if the application is eligible for eSignature, a button appears. Otherwise, you need to download the application and collect signatures on paper.

Collect signatures and submit

To collect signatures electronically

- ☐ Click the **Request eSignatures** button.
- ☐ Verify the email addresses for all signatories to initiate the forms being sent electronically.
- ☐ Click **Send Requests**.
  - ✓ The status changes to "Awaiting Signatures."
  - ✓ The client has 7 days to complete the signature process. The application is locked at this time.
- ☐ Receive notification that forms are signed.
- ☐ Resume completion of the forms electronically and click **Sign and Submit** button.

Note! Only the soliciting producer can complete this final portion of the eSignature process.

- – review disclosure information and validate if the application is for a replacement.
- – You'll know your submission is complete when a policy number is assigned and the case moves to the Pending Tab.

To collect signatures on paper:

- ☐ Click **Download Forms (PDF)** button.
- ☐ Complete the remaining sections of the application, if not completed online.
- ☐ Collect signatures.
- ☐ Submit to your New Business staff to complete the submission process.
  - ✓ The application package must be in-good-order and pass a final validation check before it can be submitted.