

E-APP STOREFRONT GUIDE



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Quick Start Guide



Designed specifically for our Medicare supplement, dental and prescription drug plan producers, this new e-App storefront has everything you need and want to complete and submit applications for quick issue — to save you time and ensure accuracy.

Whether you write hundreds of applications a year or are an occasional writer, you'll love the efficiency you gain with this helpful storefront tool. Chances are you won't go back to paper.

- Saves time
- Eliminates guesswork
- Easy for you and applicants
- Reduces frustration of outdated forms
- Quick issue
- Simple to keep track of apps in progress
- Reduces paper app supply
- Multiple applicant signature options available
- Ability to download and/or print completed applications
- Your commissions are paid faster

e-App Features

When using the e-App storefront, you'll discover an array of time-saving features and benefits, including:

- Underwriting rules are automatically applied
- FDA database prescription drugs and dosages are listed if needed
- Visual cues to indicate your progress through the app, missing information or clarifications
- One signature covers all forms for you, but if you have bundled products, your client will still have to sign them separately
- Answers to simple questions reveal only the additional questions your client needs
- Client information auto fills through multiple types of applications, such as Med supp, dental and Prescription drug plans
- Client has signature options
- Real-time rate quotes and data automatically updates
- Dashboard showing all your applications and progress across multiple Senior Health product lines
- VeriSign™ Secured for sensitive information

Who Can Use e-App

You can complete the e-App with applicants in person or on the phone.

Who	What's Required
Producer — Licensed and Appointed for Medicare supplement, dental and/or PDP	Internet connection, email account and registered on Sales Professional Access (See "Getting Started" on page 5)
Applicant — You complete the e-App for anyone with an internet connection; an email address is preferred but not required*	<ul style="list-style-type: none">▪ Bank account information, Medicare Beneficiary ID (MBI) and Social Security number for signing▪ Prescription drug information, if policy is underwritten▪ Medicare card, if available

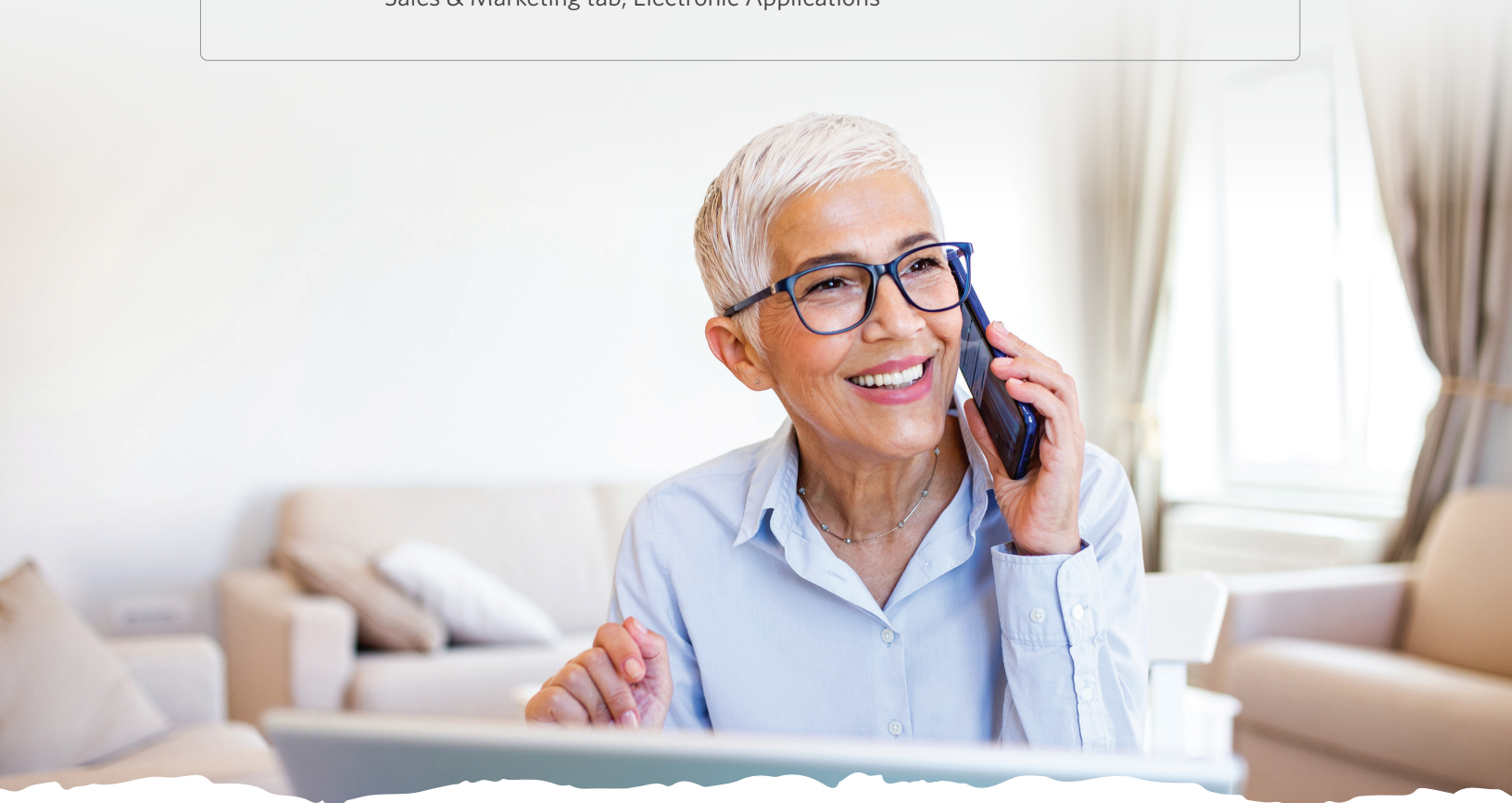
*Applicant will need to visit signyourmedsuppapp.com, instead.



Where It's Located

Sales Professional Access, MutualofOmaha.com/sales-professionals, in two places:

- Welcome page, Sales Tools, Electronic Applications
- Sales & Marketing tab, Electronic Applications



Getting Started



Ready to Get Started Writing Business?

Make sure you are logged into Sales Professional Access (SPA). The electronic enrollment form can be found on SPA. Follow the below path to get to the e-App:

Sales Professional Access > Sales Tools > Electronic Applications > Senior Health Storefront

Senior Health Storefront button

The screenshot shows the Mutual of Omaha Sales Professional Access (SPA) interface. At the top, there is a dark blue header with the Mutual of Omaha logo on the left and a user profile icon on the right. Below the header, a navigation bar contains the text "Sales Professional Access" followed by menu items: "Products", "Sales & Marketing", "Reports", and "Training & Compliance". A search icon is located on the far right of this bar. Below the navigation bar is a dark blue bar with the text "Close a user". The main content area has a heading "Electronic Applications" and a sub-heading "Submitting applications electronically is so quick and easy you may never go back to paper." Below this is a search bar with the text "Learn about using e-Apps and the sandbox" and a dropdown arrow. On the left side, there is a sidebar menu under the heading "Medicare Solutions" with items: "Dental Savings", "Life", "Long-Term Care", "Disability", and "Critical Illness". Below the sidebar, it says "Weekly maintenance: Fridays 10 p.m. - 2 a.m. CT" and "Show Details" with a dropdown arrow. On the right side, there is a section titled "Medicare Solutions" with a blue button labeled "Senior Health Storefront". Below the button, it says "Mutual of Omaha Medicare Supplement plans, Individual Dental plans and Prescription Drug Plans" and a link to "Storefront Training Guide".



From your Senior Health Current Applications Dashboard, you can search for a customer, scroll through the pages to find a customer or if you want to start a new application, click the blue “Start Application” button. You can also obtain your Personal URL (PURL) from the CF e-App Links button.

Senior Health Dashboard

Current Applications

Search Customers

Applicant First Name: Applicant Last Name: Phone Number: Advanced Search

Enrollee	Phone Number	State	Last Modified	Product	Current Status
Sagep Andjes	(800) 800-8000	NJ	12/20/2023	Quota Started	Quota Started
JL Demco	(175) 587-2609	NE	12/06/2023	879642 96	Application Signed
Brian Test	(120) 323 3234	NE	12/05/2023	882076 96	Application Signed
Flow Broch	(120) 323 3233	NE	12/06/2023	882398 96	Quota Started
MedSuppDex Broch	(120) 323 3231	NE	12/06/2023	882109 96	Application Signed
Brian Test	(120) 323 3234	NE	12/07/2023	882109 96	Application Signed
TS Davis	(140) 442 3551	OK	12/13/2023	887340 96	Printed for Signature
TS Test	(402) 244 5678	NJ	12/13/2023		Application In Progress
TS Hovee	(187) 894 5542	NY	12/13/2023		Application In Progress
TS Nelson	(138) 794 6606	NE	12/13/2023		Application In Progress

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Dashboard Highlights

On the Senior Health e-Application Dashboard, you'll find the following:

- Obtain your Personal URL
- Search for Applicants by Name or Phone Number, Advanced Search using Confirmation Number, State or Status
- Start a new application
- Names, phone numbers and state of enrollees who have started the application process
- Date of last modification
- Products that have been started
- Status of products started
- Ability to scroll through pages of enrollees

If you have already started the application process, you can click on the enrollee's name from the dashboard and see all the details for that enrollee. Here you can edit the customer details, email initial documents, view or start a quote, start an SOA, review SOA, start an enrollment or continue an application.

Senior Health Dashboard

Current Applications

Search Customers

Applicant First Name: Applicant Last Name: Phone Number: Advanced Search

Enrollee

Sagep Andjes

Agreement ID: Dental Insurance: 910271067

Customer Details

Phone Number: (800) 800-8000 State: NJ Date of Birth: 01/11/1940 [Edit Customer Details](#)

Home Address: 353 Main St, Princeton Junction NJ 08550 Mailing Address: Same as home Email Address: [Email Initial Documents](#)

Products

Senior Health Storefront
Medicare Supplement Insurance | Dental Insurance [View Quote](#)

Medicare Supplement Insurance & Dental Insurance Quotes

Applications

Medicare Supplement Insurance [Continue Application](#)

Medicare Supplement Insurance [Application In Progress](#)

Dental Insurance [Application In Progress](#)

Prescription Drug Plan

Scope of Appointment Form [Start SOA](#)

Scope of Appointment Form

Quote

Annual Cost Estimation [View Quote](#)

Annual Cost Estimation

Enrollment

Enrollment Form [Continue Application](#)

Enrollment Form

Enrollee

Test Test

Home Address: 1234 main st, Falmouth WI 53005 Mailing Address: Same as home Email Address: [Email Initial Documents](#)

Test Person

Products

Senior Health Storefront
Medicare Supplement Insurance | Dental Insurance [View Quote](#)

Medicare Supplement Insurance & Dental Insurance Quotes

Applications

Medicare Supplement Insurance [Continue Application](#)

Medicare Supplement Insurance [Application In Progress](#)

Dental Insurance [Application In Progress](#)

Prescription Drug Plan

Scope of Appointment Form [Start SOA](#)

Scope of Appointment Form

Quote

Annual Cost Estimation [View Quote](#)

Annual Cost Estimation

Enrollment

Enrollment Form [Continue Application](#)

Enrollment Form

The screenshot shows a dashboard with a sidebar on the left containing menu items: Demo Broich, Demo Two, Dental Only, Med Supp, and Medsupp Two. The main content area is divided into several sections:

- Applications:** Contains two rows. The first row has a checkbox for 'Medicare Supplement Insurance' and a 'Continue Application' button with an 'Application In Progress' status. The second row has a checkbox for 'Dental Insurance' and another 'Application In Progress' button.
- Prescription Drug Plan:** Contains a section for 'Scope of Appointment' with a checked checkbox for 'Scope of Appointment Form'.
- Quote:** Contains a checkbox for 'Annual Cost Estimation' and a 'Start Quote' button.
- Enrollment:** Contains a checkbox for 'Enrollment Form' and a 'Start Enrollment' button, which is circled in red.

The Dashboard indicates the application status:

Status	Explanation
New Customer	Customer profile has been created but nothing else has been done
SOA with Customer	SOA has been sent to customer and is waiting customer review and signature
SOA Ready for Producer	SOA has been reviewed and signed by customer, is ready for producer to review and complete
SOA Completed	SOA has been signed by customer and completed by producer
Quote Started	Customer information has been filled out and quotes have been generated, but not yet sent to customer
Quoted	Quote has been generated to be shared with customer
Enrollment in Progress	PDP application has been started, but not completed
Enrollment Submitted	PDP application has been completed and submitted
Application in Progress	Med supp or dental application has been started, but not completed
Application Pending Signature	Med supp or dental application is waiting for customer's signature
Application Signed	Med supp or dental application has been signed and submitted
Application Signature Declined	Applicant declined to sign the application



How It Works

Step-by-step Med Supp, Dental and PDP e-App process:

1. You sign onto Sales Professional Access and open the e-App storefront.
2. Applicant has their internet browser and email account open.
3. You arrive at your Dashboard, (see previous page for dashboard abilities) click on your applicant's name to view the "Customer Details." Under the "Products" header, click "Email Initial Documents" to email required docs to the applicant.
4. You click "Start Application" to generate a premium quote. See Image **1**
5. You will select the optional Quote type (Dental quote only) and answer the dual quote question. From there you will ask the applicant the required questions, enter the information, click "Get Quote" button to retrieve plans/quotes and select a plan. You can also select a dental plan while you are on the quote screen.
6. Select a plan. Click "Next" to begin the application. See Image **2**
7. You'll then be brought to a quote review page where you'll review the total monthly cost, view the outline over coverage and/or email the quote using the Email Quote link. Once reviewed, click the "Begin Application" button. See image **3**
8. You'll begin with the Medicare supplement application. Answer questions in the Applicant Info, Medicare Questions, Dental Questions, Payment, Producer Questions and Review and Submit sections. As you complete each section, a green check mark will appear next to the completed section. See image **4**
9. On the "Review and Submit" page, you can review and/or edit the applicant's personal information, payment information, review policies in application, review outline of coverage, download your applications, edit any answers on the applications and review or edit any of the Producer answers.
10. Select "Submit" to send an email from Mutual of Omaha to the applicant with the available signature options.
11. The Completed page will give you instructions for having the applicant sign the application. If the applicant doesn't have email, they will sign the application via voice signature by calling the 800 number provided or via e-signature by visiting **SignYourMedSuppApp.com** and login in using the authorization number listed on the "Storefront Completed Page." See image **4**

1

Get a Quote

Select Quote type (optional):
 Dental Quote Only

Are you completing a dual quote?
 Yes No

Applicant Information
 Applicant A

First Name* [] SS Last Name* []
 Phone Number* [] Date of Birth* []
 XXXXXX-XXXX [] []
 Email Address [] ZIP Code* [] State []
 Medicare Part A Eligibility Date* [] Requested Effective Date* []
 [] []

Get Quote

2

Quote Results

Please review the following options and make the appropriate plan selections. The application will only include one applicant's products but the other applicant's selections will be saved to their profile for easy access within the senior health product dashboard.

Medicare Supplement Insurance
 4 plans in your area

	Plan G	Plan A	Plan N
Household Discount	32% OFF	32% OFF	32% OFF
Tester Test	Select \$118.79 /month	Select \$137.66 /month	Select \$87.87 /month

Dental Solutions
 2 plans in your area

	Mutual Dental Preferred	Mutual Dental Protection
Tester Test	Select \$47.19 /month	Select \$24.24 /month
Vision Care Rider	Add \$8.28 /month	Add \$8.28 /month

Next

3

Only one applicant can apply at a time. If no unselected application will be saved to your senior Health product dashboard to begin at a later time.

APPLICANT A [Edit Quote](#)

Tester Test **\$151.31 total monthly cost**

MEDICARE SUPPLEMENT INSURANCE
Plan G
 \$118.79 /month
[Download Outline of Coverage](#)

DENTAL INSURANCE
Mutual Dental Protection
 \$24.24 /month
[Download Outline of Coverage](#)

OPTIONAL VISION RIDER
Vision Care Benefit
 \$8.28 /month
[Download Outline of Coverage](#)

xyzz@gmail.com [Email Quote](#)

Begin Application

4

Storefront Completed

Please provide the applicant with your contact information as well as the information below about their applications.

Storefront Applications

- Medicare Supplement Insurance
 Authorization: 9316078
- Dental Insurance
 Authorization: 642933

Signature Process Information

The applications have been emailed to the applicant for signature. The E-Signature process is being turned over to the applicant who can choose on which device to sign the application.

Each application must be signed separately.

To sign and complete the applications, applicant can either:

- E-sign by selecting the link that is provided in the email sent to their email address.
- Visit www.medicare.com and login using their authorization number.

Finished with this applicant?

Return to Dashboard

12. Applicant reviews the application and required documents and signs the application (see the "Signature Options" section for details).

13. Back on your dashboard, you'll see the status has changed to "Application Pending Signature."
See image **5**
14. Once the applicant signs the applications, you'll receive an email that the applicant signed and submitted the application to Mutual of Omaha; the application with a pending policy number will show up on your dashboard. You'll also get an email when the applicant receives a premium change or declines to sign the application.
15. Once the file is received, it appears on your Health Case Monitoring Report on Sales Professional Access.
16. To fill out a prescription drug plan application, you'll repeat the above steps; however, you have two options to start. Click the blue "Start Application" button and select "Prescription Drug Plan" from the drop-down or click the applicant's name, scroll down to the Prescription Drug Plan header and click "Start SOA." See image **6**
17. Follow these steps to obtain and submit a SOA. In the example, we emailed the SOA to the applicant to be completed. Once the form is filled out, you'll receive an email letting you know the SOA has been signed. On your dashboard, you'll see the "Scope of Appointment" section is checked off, along with Ready for Producer if you still need to sign the form. See image **7** and **8**
18. You can click "Review SOA" if you still need to complete your portion of the SOA form.
19. You can now either "Start Quote" or "Start Enrollment" for the Prescription Drug Plan.
20. By starting a quote, you'll fill out the ExtraHelp, Medications-Pharmacy, Plan, Recommendations sections and then you'll select "Start Enrollment."
21. You'll then follow the same steps you used for filling out the Medicare supplement and dental applications; the applicant's information auto populates from previous applications if you start the PDP application from the customer record. If you start a brand new record by clicking the "Start Application" button at the top of the dashboard it treats it like a brand new person and the data will not transfer.
22. You'll fill out all the required information in the Customer Information, Benefits, Payment, Agent Information sections and then select "Review and Complete" the enrollment. **NOTE:** If the section has a green check mark, that indicates the section is complete. If there is an orange triangle with an exclamation mark, it indicates there is incorrect or missing information in that section. You won't be able to proceed until that information is corrected. See image **9**

5

Senior Health Dashboard

Senior Health Dashboard [CP e-App Links](#) [Start Application](#)

Current Applications

Search Customers

Applicant First Name Applicant Last Name Phone Number [Advanced Search](#)

[Search](#) [Clear](#)

Enrollee	Phone Number	State	Last Modified	Product	Current Status
TS Silva	(330) 266-6881	NE	12/13/2023	CD	Application in Progress Quote Started
Brian Test	(323) 323-3234	NE	12/16/2023	CD	Application Pending Signature Application Pending Signature
Esti Test	(402) 424-8889	NE	12/29/2023	CD	Quote Started Application in Progress
TS Waters	(337) 539-6590	NE	02/02/2024	CD	Application in Progress Quote Started
TS Caldwell	(321) 732-8238	NE	01/03/2024	CD	Application in Progress Quote Started
Brian Test	(320) 323-3235	NE	01/11/2024	CD	Application in Progress Application in Progress
TS Jensen	(330) 233-6719	NE	01/11/2024	CD 89032-96	Application Signed Quote Started
TS Mackie	(321) 940-5777	KY	01/11/2024	CD 89036-96	Application Signed Quote Started
TS Axford	(320) 462-7216	OR	01/11/2024	CD 890317-96	Application Signed Quote Started

6

Senior Health Dashboard

Current Applications

Search Customers

Applicant First Name Applicant Last Name Phone Number [Advanced Search](#)

[Search](#) [Clear](#)

Select Application

- Senior Health Storefront
- Prescription Drug Plan

Enrollee

TS Testerson

Products

- Medicare Supplement Insurance | Dental Insurance

Quote

Medicare Supplement Insurance & Dental Insurance Quotes [View Quote](#)

Applications

- Medicare Supplement Insurance (APPLY N-3002070) [Edit Pending Application](#)
- Dental Insurance (APPLY N-6400363) [Edit Pending Application](#)

Prescription Drug Plan

Scope of Appointment

Scope of Appointment Form [Start SOA](#)

Quote

Annual Cost Estimation [Not Ready](#)

Enrollment

Enrollment Form [Not Ready](#)

7

Scope of Appointment

A Scope of Appointment (SOA) is required for all sales appointments. You can send/upload the SOA now, or submit the SOA once you have received it from the beneficiary.

Add an SOA

Only one of the following types must be completed:*

Email Upload Stored Paper Form

Emailed Form

Email Address* [Send](#)

Email Sent

9

Enrollment Summary for Test Testerson

Products

PRESCRIPTION DRUG PLAN Rx Essential
\$18.40 /month
[Download Plan Formulary](#)

Customer Information [View](#)

Benefits [View](#)

Payment

Agent Information

Review

Completed

Contact Us

Omaha Health Insurance Company
PO Box 66535, St. Louis, MO 63166
(855) 864-6797 (TTY: 711)
Hours: 24 hours a day

Privacy Policy [View](#)
Terms of Use [View](#)
Accessibility Services [View](#)

Let's review your selected products.

It looks like you came from a quote where you selected **Mutual of Omaha Rx Essential**.

Please review your plan choice and make changes here:

PRESCRIPTION DRUG PLAN
Offered by Mutual of Omaha Rx [Search for a Pharmacy](#)

Enroll in this plan

Mutual of Omaha Rx
Essential
\$18.40 /month
Deductible Per Year
Tier 1 - \$0
Tiers 2-5 - \$505

Coverage
Great for customers with no medications or those on maintenance medications

Enroll in this plan

Mutual of Omaha Rx
Premier
\$62.20 /month
Deductible Per Year
Tiers 1 & 2 - \$0
Tiers 3-5 - \$505

Coverage
Provides \$25 per month Tier 3 Select Insulin coverage and Tier 3 is a copay to reduce member cost and provide predictability.

Enroll in this plan

Mutual of Omaha Rx
Plus
\$75.30 /month
Deductible Per Year
Tiers 1-5 - \$505

8

Senior Health Storefront

Medicare Supplement Insurance | Dental Insurance [55 Email Initial Documents](#)

Quote [View Quote](#)

Medicare Supplement Insurance & Dental Insurance Quotes

Applications

- Medicare Supplement Insurance [Edit Pending Application](#)
- Dental Insurance [Edit Pending Application](#)

Prescription Drug Plan

Scope of Appointment

Scope of Appointment Form [Start Quote](#)

Quote

Annual Cost Estimation

Enrollment

Enrollment Form [Start Enrollment](#)



23. Once you fill out all the application sections, you'll review the application and click "Submit." If you need to change any information, you'll click the "Edit" links for each section. From here you can also download the PDP enrollment form or the plan formulary.

Enrollment Summary for Test Testerson

Products
PRESCRIPTION DRUG PLAN Rx Essential
 \$18.40/month
 Download Plan Formulary

Customer Information (Completed)
Benefits
Payment
Account Information

Review and Submit
 Take a minute to review this information. If anything is incorrect, please update before submitting the enrollment.

Personal Information (Edit)
 Name: Sarah
 Test Testerson
 Email: sarah.ttesterson@mutualofomaha.com
 Gender: Female
 Date of Birth: 10/18/1955
 Home Phone Number: (337) 456-1234
 Residential Address: 1234 567th St, Omaha, NE 68135
 Mailing Address: Same as Residential Address

Payment Information (Edit)
 The first payment of \$18.40 for the Prescription Drug Plan will be deducted on 04/01/2023.
 Future payments will be deducted on the first day of each month.
 The enrollee selected MANUAL Payments and will receive a bill in the mail monthly.

Product Review (Manage Products)
Prescription Drug Plan
 Mutual of Omaha Rx Essential \$18.40/month
 Download Plan Formulary

Important Information
 The policy will begin 04/01/2023
 Edit the benefit information

Agreement
 I understand that my submission (or submission of the person authorized to act on my behalf under the laws of the State where I live) of this application means that I have read and understood the contents of this application, and that I confirm that the information I have provided is accurate. If submitted by an authorized individual (as described above), this submission certifies that 1) this person is authorized under State law to complete this enrollment, and 2) documentation of this authority is available upon request by Insured.

[Download the Prescription Drug Plan enrollment form](#)

Previous **Submit**

24. Your last PDP enrollment screen will be the completed section.

To complete an app for a second applicant in the same household, you'll follow the above steps filling out each person's app separately. You have the option of selecting "Completing a Dual Quote" for an additional member. If the additional applicant does not reside in the same ZIP code, you'll need to enter the quote individually.

Quote
 Get a Quote
 Are you completing a dual quote?
 Yes No

Applicant Information
 Applicant A
 First Name* [] Last Name* []
 Phone Number* [] Date of Birth* []
 Email Address [] ZIP Code* []
 Medicare Part A Eligibility Date* [] Required Effective Date* []

Applicant B
 First Name* [] Last Name* []
 Phone Number* [] Date of Birth* []
 Email Address [] ZIP Code* []
 Medicare Part A Eligibility Date* [] Required Effective Date* []

Get Quote



New Functionality

New functionality allows a Producer to upload documents from the sub category — Notes to Underwriting section of the Medicare Questions Category.

Producers now have the ability to split commissions with other producers for the Medicare supplement and Dental products.

The Split Commission section is located on the Producer Questions screen (see image below).

The screenshot shows the Mutual of Omaha Producer Questions screen. The 'Producer Questions' section is highlighted with a red box. Below it, the 'Split Commission' section is also highlighted with a red box. This section includes a 'Medicare Supplement Insurance' table and a 'Dental Insurance' table. The Medicare Supplement Insurance table has columns for 'Producer's Working Business', 'Commission Split', and 'Your Commission'. The Dental Insurance table has columns for 'Producer's Working Business', 'Commission Split', and 'Your Commission'. A red validation message is displayed under each field in the Medicare Supplement Insurance table.

Producer's Working Business	Commission Split	Your Commission
1221507	20 %	80 %

Producer's Working Business	Commission Split	Your Commission
1221507	50 %	50 %



- Both producers must be under the same hierarchy, licensed, and appointed
- Total commissions together must equal 100%
- Red validation message will be displayed under each field if there is incorrect or missing information.



Note

For the state of Florida, there will be an additional required field for the Producer's License Number.

View the screenshot of the Upload Documents enhancement added to the Notes to Underwriting page.

The screenshot displays the Mutual of Omaha application interface. On the left, a sidebar contains the Mutual of Omaha logo, an application summary for 'Upload Document', and a 'Products' section for 'Medicare Supplement Plan A' with a monthly premium of \$151.10. Below this is a progress indicator for 'Applicant Information' and 'Medicare Questions', followed by a list of steps: Household Discount, Part A & B, Previous or Existing Coverage, Guarantee Issue Period, Requested Start Date, Medicare Section Review, and Notes to Underwriting (which is the current step). At the bottom of the sidebar are links for Privacy Policy, Terms of Use, and Accessibility Services.

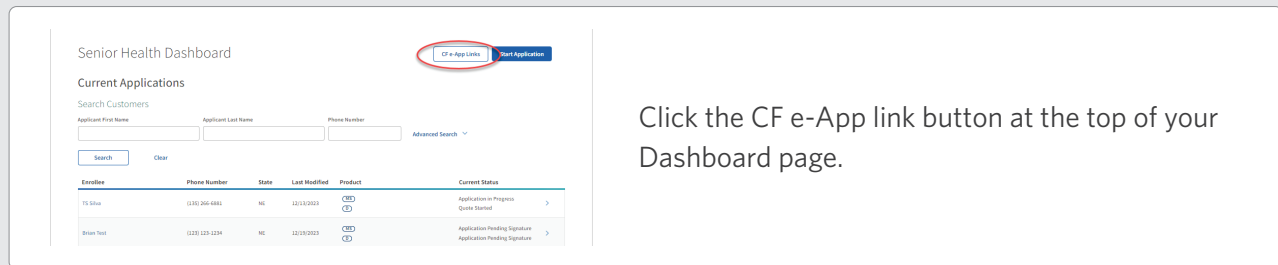
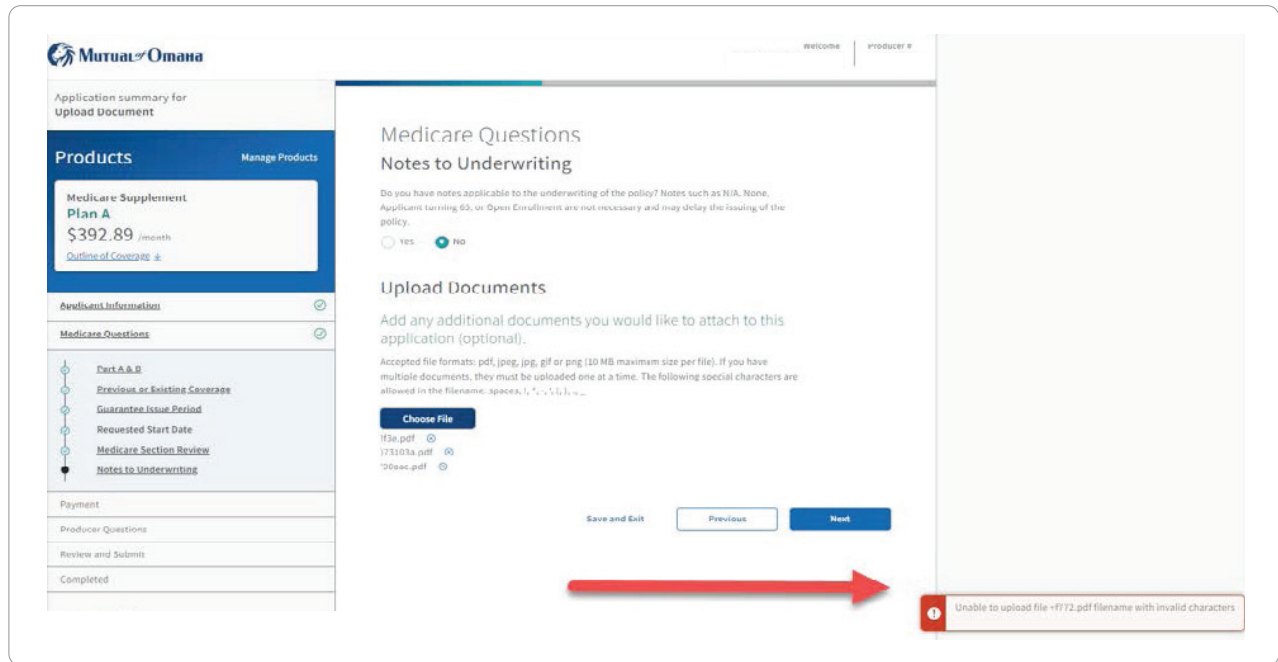
The main content area is titled 'Medicare Questions' and 'Notes to Underwriting'. It asks, 'Do you have notes applicable to the underwriting of the policy? Notes such as N/A, None, Applicant turning 65, or Open Enrollment are not necessary and may delay the issuing of the policy.' with radio buttons for 'Yes' and 'No' (selected). Below this is the 'Upload Documents' section, which includes the instruction: 'Add any additional documents you would like to attach to this application (optional)'. It lists accepted file formats (pdf, jpeg, jpg, gif or png) and a 10 MB maximum size per file. A 'Choose File' button is present. At the bottom right of the main area are 'Save and Exit', 'Previous', and 'Next' buttons.



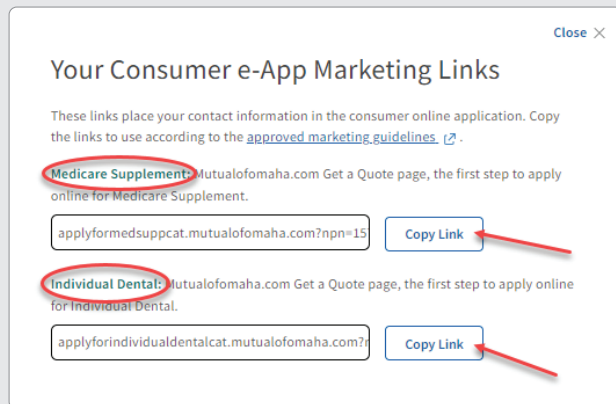
Note

Users can upload documents for underwriting in the following formats: pdf, jpeg, gif or png. If you have multiple documents, they must be uploaded one at a time.

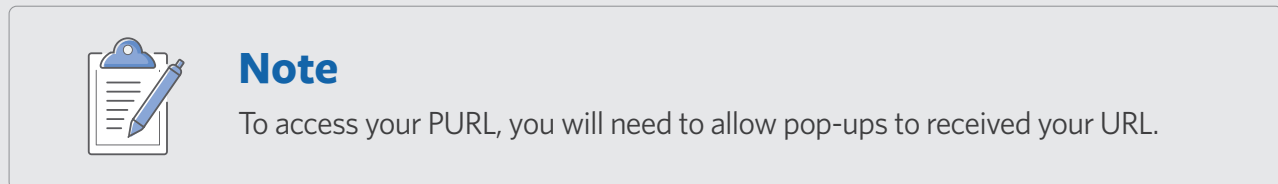
If the user attempts to upload a document with non-allowed special characters in the file name the following will display, "Unable to upload file".



Click the CF e-App link button at the top of your Dashboard page.



When you click the CF e-App link button, this modal will appear. Click "Copy Link" button for either Medicare supplement or dental insurance and provide that specific link to your customer. You can also use the link to personalize prospecting pieces, that can be ordered through your normal channels.



Payment Options

At time of application, both the initial payment information and the renewal premium payment information must be collected. The applicant must have their name on the payment accounts.

Initial Premium Options

- **Automatic Bank Withdrawal:** Bank routing and account numbers are required. Checking or saving account is accepted.
- **Credit Card:** Visa or MasterCard are the only cards accepted. Debit cards and Social Security cards are not accepted. Applicant must also create an account to log in.*
- **Check:** If completing via e-App, this option is unavailable. A paper application will need to be filled out and mailed or faxed in.

Renewal Premium Options

Applicants may choose from these automatic bank withdrawal days:

- **Monthly by Day:** First through the 28th or the last day of every month
- **Monthly by Week and Weekday** (Monday - Friday)

Applicants not choosing automatic bank withdrawal may mail their premiums quarterly, semi-annually or annually.




Avoid Processing Delays With These Credit Card Tips:

- Make sure the applicant has appropriate funds on the card. Credit card draft occurs at the time of issue not effective date.
- Confirm the mailing address with the applicant. P.O. Box addresses can cause failures if the billing ZIP codes do not match.
- Confirm the billing ZIP code for the card. If your applicant has recently moved, make sure the card billing address has been updated.



Signature Options

The following criteria determine how the applicant may sign the e-App:

Signature Method	Available on These Types of Business	When the Initial Payment Is
<div style="text-align: center;">  <p>Electronic</p> <ul style="list-style-type: none"> ▪ Has email and/or internet access (email address not required) ▪ Must review initial documents before signing ▪ Enters credit card information ▪ If no email address, but has internet access, can sign by going to SignYourMedSuppApp.com ▪ Must review the application and required documents ▪ Enters Social Security number and banking information if not provided to you ▪ If paying by credit card, is prompted to create a secure account on Customer Access before signing the application ▪ e-Signs by clicking the “Submit Application” button </div>	<ul style="list-style-type: none"> ▪ Underwritten ▪ Guaranteed issue ▪ Open enrollment 	<p>Automatic bank withdrawal or credit card payment via Visa or Mastercard*</p>
<div style="text-align: center;">  <p>Voice</p> <p>Applicant must review application and initial documents before calling the voice signature phone number, 1-866-379-9513. The automated voice response system prompts applicant to state their name, date and agree to the application.</p> </div>	<ul style="list-style-type: none"> ▪ Underwritten ▪ Guaranteed issue ▪ Open enrollment 	<p>Automatic bank withdrawal</p>
<div style="text-align: center;">  <p>Wet Signature</p> <p>You mail or deliver the application and documents to the applicant to sign and submit. Primarily used when the applicant is not the bank-account holder or prefers to wet sign.</p> </div>	<ul style="list-style-type: none"> ▪ Underwritten ▪ Guaranteed issue ▪ Open enrollment 	<p>Automatic bank withdrawal or check</p>

* Applicants using credit cards must provide their statement billing address so the payment is processed. See Signature Process. Credit card payment is not available in New York.

e-App Functions and Navigation

Navigation

- **Green/White Checkmark:** Page is complete and in good order
- **Orange Triangle Exclamation Mark:** Page is missing information. Go to the page and read the directions or look for the yellow-highlighted area
- **Blue Dot:** The page you're on
- Tab through the answer fields
- Tap "y" key for yes and "n" for no
- In dropdown boxes (state, drugs, etc.), type the first few letters of what you want to locate
- Use the left navigation to jump to any page that has been completed. You are unable to jump to an uncompleted page. For example, you can work on the Producer page while the applicant gathers prescription drug information. Or, you can add notes to the underwriter when discussing prescription drug use.

Buttons

- **Previous/Next:** Moves you backward or forward one page at a time
- **Continue to Review:** When all check mark circles are green, takes you to the Review page to go over the information with the applicant and revise anything
- **Save:** Retains answers in the database
- **Close:** Saves answers to the database, saves record to the dashboard and takes you to the dashboard
- **Edit Quote:** Takes you back to the quote page
- **Attach Eligibility Documents:** Before signature, you attach the required proof of eligibility for guaranteed-issue coverage
- **Initial Documents:** Enables you to email the required documents to the applicant
- **Submit:** Sends an email to the applicant containing the authorization code, signature options and required documents

Messages

Navigation



Applicant Information

Information is complete



Incomplete

Incorrect or missing information



Error

You must fix all errors before proceeding



Futher Action Required

Tells you why the application cannot be submitted



Informational

Provides more details

Common Issues

For additional help, see “Resources” on page 19.

1. Applicant doesn't have internet access.

You may complete the e-App with the applicant in a location with internet access using a laptop or PC. Print the forms and give them to the applicant. They can voice sign by calling the automated number. See “Signature Options” for details. Or an applicant can see the initial documents on **MedSuppDocs.com** and sign the application on **SignYourMedSuppApp.com**.

2. Applicant doesn't have an email account but has internet access.

Have applicant go to **MedSuppDocs.com** to view/print required documents. To sign the application, have them go to **SignYourMedSuppApp.com**. They will enter the authorization number you provide along with their first and last name, and their date of birth in this format: MM/DD/YYYY.

3. Applicant doesn't want to give banking information to you.

Applicant may enter the information at time of e-signature. Voice signature is not an option.

4. How do I start applications for multiple products at the same time?

After entering the customer's information, the quote results page will display Medicare supplement and Individual Dental and Dental Savings plan rates. You'll be able to select any of the products and proceed to apply for them all at once. You'll have to fill out a separate enrollment for prescription drug plans; however, the customer's information transfers over to the PDP enrollment pages.

5. Can I include prescription drug plans (Part D) in the combined application?

Medicare supplement and Dental will generate a combined quote and application. The Part D will be managed as a separate process due to requirements around the Scope of Appointment but will still be managed on the dashboard.

6. Why can't Medicare find my client's information?

If you're confident the number you have matches what the Medicare card shows, proceed with the application and Underwriting will investigate why the information isn't found.

7. When future dating Part B, where do I input that effective date?

If the applicant has not yet enrolled in Part B, but has an anticipated date, they should enter that date in the “Planned Part B Enrollment Date” field.

8. What products can I manage from my storefront?

You'll be able to manage your customers' applications for Medicare supplement, Individual Dental and Medicare Part D, all within the same customer profile on the new dashboard as well as view current statuses.

9. Why didn't my client receive the email?

Verify all circles have green check marks in the e-App and you selected "Continue to Review" and "Submit" buttons. If it still isn't showing up, the applicant must visit **SignYourMedSuppApp.com** and use the authorization number you provided.

10. Where do I find the authorization number?

Option 1:

After an e-App is filled out, the applicant receives an email from Med.Supp.eApp@mutualofomaha.com (subject line: Your Medicare Supplement Application is Ready to Be Completed). The authorization number is prepopulated in this email.

Option 2:

Once the e-App is completed, the next page is a "Completion" page containing the unique authorization number. If the applicant doesn't have an email, tell them to visit **SignYourMedSuppApp.com** and use the authorization number you provided from the "Completion" page. **Note:** The authorization number is also displayed on the customer detail screen on the dashboard, if you have navigated away from the "Completion" page.

11. Why did the phone number not generate for a voice signature?

This means the voice signature option is not available for this applicant due to any of the following reasons:

- Applicant wants to provide their own payment account info
- Applicant wants to make the initial premium via credit card
- The payment account owner is not the same as the applicant

12. Why can't I enter my applicant's credit card information?

Due to security reasons, Mutual of Omaha does not save credit card information. The applicant enters the credit card information when signing the application.

13. When applying for Medicare supplement and dental together, will the customer need to sign each application separately?

Yes. When using voice signature options or e-Signature options, there will be credentials for each product and the customer will need to complete the signature process for both products, separately.

14. Can I navigate between the sections in any order?

You must complete the applications in set order before being able to navigate forward. This allows us to run rules behind the scenes that will ensure proper information and state specific requirements are in place.

Quotes on the Go

Quickly run quotes for your clients whenever, wherever with our easy-to-use mobile app. Available on all Android and Apple devices, it allows you to customize the product view to products you sell. Mobile quotes are currently available for these products:

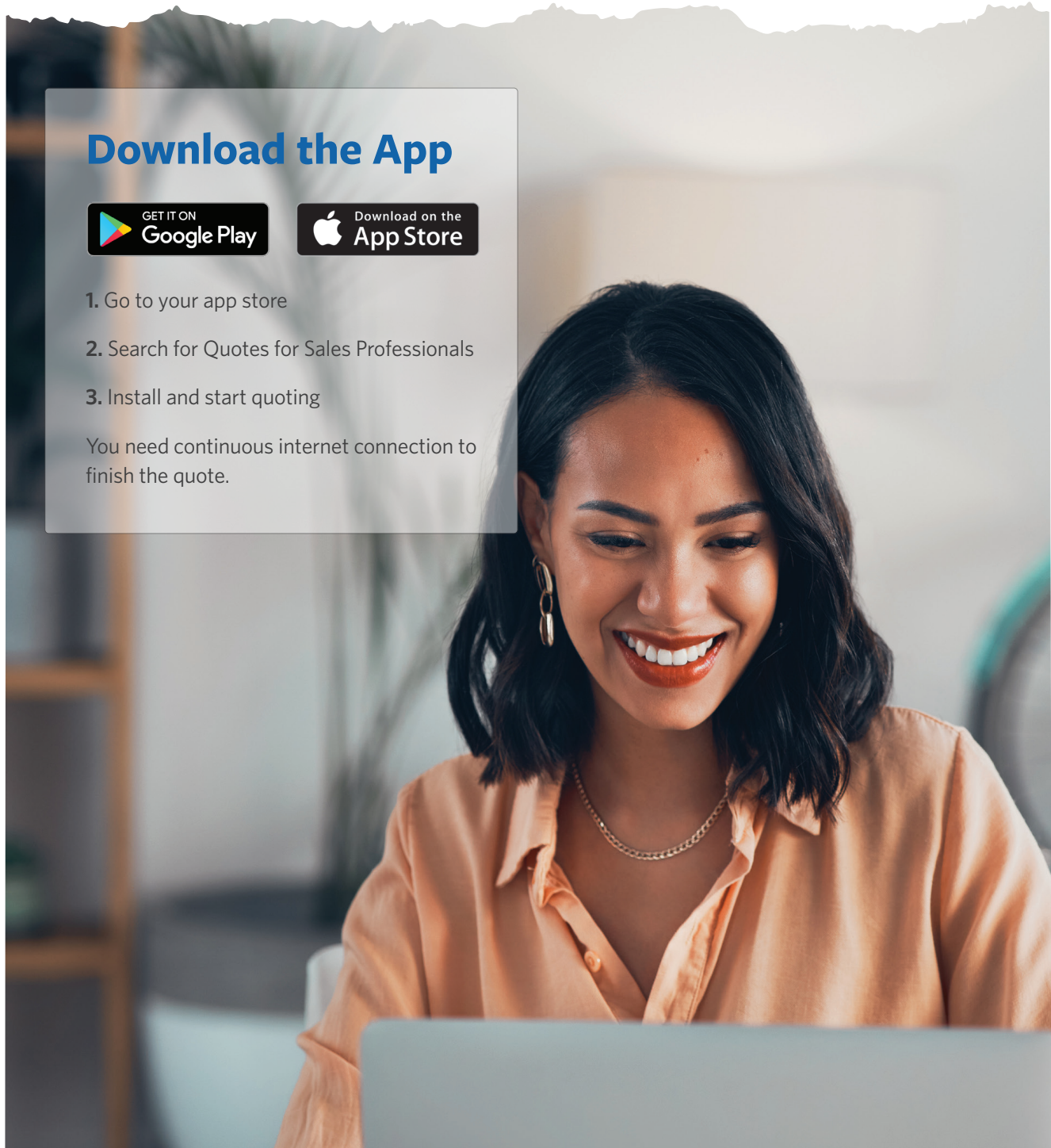
- Children's Whole Life
- Critical Advantage
- Guaranteed ADvantage
- Guaranteed Universal Life Express
- Indexed Universal Life Express
- Individual Dental
- Living Promise
- Long-Term Care Insurance
- Medicare Supplement
- Term Life Answers
- Term Life Express

Download the App



1. Go to your app store
2. Search for Quotes for Sales Professionals
3. Install and start quoting

You need continuous internet connection to finish the quote.



Resources

For additional helpful resources, go to the Electronic Applications page under the Sales & Marketing tab on Sales Professional Access MutualofOmaha.com/sales-professionals.





Why Mutual of Omaha

Over 50 years of Mutual of Omaha's Wild Kingdom taught us that the animal kingdom and the human kingdom have something in common ... an instinct to protect what matters most. Through insurance and financial products, we help people protect their lives, protect their families, protect their kingdoms.

MutualofOmaha.com