



Using the New Business Pending Reports

The New Business Pending Reports is the primary way for agents to communicate with Fidelity Life Association, New Business area. There are two parts to the reports. The first part of the reports contains a list of all cases being processed by FLA. The second part of the report provides the detail about any given case. It is imperative that the agent review the pending cases on a regular basis checking for requirements that might be needed in order to issue the policy.

Use the following steps to access the New Business Pending Reports.

1. Open FLA's web page.
 - a. Enter www.fidelitylifeassociation.com in your web browser.
 - b. Click Go.
2. Click **Agent Login**.
3. Enter login and password assigned by New Business area.
4. Click **Login** button.
Result: The New Business Pending Report displays.

FIDELITYLIFE
Established 1896

Last Activity, From: To: Last Name, From: To:

Status: Agent: Policy No.:

<u>Insured Name</u>	<u>Policy</u>	<u>Writing Agent</u>	<u>Plan</u>	<u>Face Amount</u>	<u>Last Activity Date</u>	<u>Status</u>
ANFER, BILLY	542245456	AMERICA DIRECT AGENT	DD45	\$50,000	09/22/2006	A

Note: The New Business Pending Report is updated daily.

Searching for a Case.

The default display is by last date that the report was updated showing all statuses and all agents. However, you can use any of the search criteria fields displayed at the top of the report to search for a specific case or group of cases.

To change the report from the default search criteria, enter the new search criteria in the appropriate field(s), then click **Display Cases**. The default date is the last date that the report was updated. To see more/all of your cases, enter the beginning date of the date range you want to see in the **From** field and the ending date of the range in the **To** field, and then click **Display Cases**.

Note: Limiting the results of the search by selecting criteria specific to your case will make finding the desired case easier. For example, searching by policy number, if you know it, or by a specific last name and status, if you don't have the policy number, could result in the display of your desired case.

Once the **Pending Case List** is displayed, you can change the sort by clicking on one of the underlined headings - **Insured Name**, **Writing Agent**, **Last Activity Date** or **Status**.

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Multiple General Agents (GA) Reports

If your Agency has General Agents (GA) associated with it, each GA has its own report.

The screenshot shows the FidelityLife logo with the tagline "Established 1896". Below the logo is a search interface with the following fields:

- Agency: BEST AGENCY USA, INC. (dropdown menu)
- Last Activity, From: 09/25/2006 To: 09/26/2006
- Last Name, From: [] To: []
- Status: All (dropdown menu)
- Agent: All (dropdown menu)
- Policy No.: []
- Display Cases (button)

Below the search fields is a table header with the following columns: Insured Name, Policy, Writing Agent, Plan, Face Amount, Last Activity Date, and Status.

To view its report, use the following steps

1. Access the **New Business Pending Case List** report using the main agency login and password.
2. Click the dropdown arrow in the **Agency** field at top right of screen.
3. Select the appropriate name from the dropdown list.
4. Click **Display Cases**.

Displaying the Pending Case Details

To display the **Pending Case Detail** screen for a specific case in the list of pending cases, single click on the row with the desired case.

or

If you know the policy number, you can

1. Enter the number in the **Policy No.** field.
2. Click **Display Cases** button.

Result: The **Pending Case Detail** screen displays.

Note when searching by policy number, you need to enter the full 10 digit number.

Using the Pending Case Detail Screen

The Pending Case Detail screen provides the following:

- Insured Information
- Application Information
- Issue Information
- Requirements

Insured Information

The Insured Information area provides the policy number, current status of the case, and the agent information. It also provides the insured name, birthdate, issue age, sex, address, home number and work number if provided.

Valid statuses include: All, Pending, Approved, Issued, Inforce, and Declined.

Application Information

The Application Information area contains the type of product purchased, the face value, and the underwriting class. It has the dates when the policy was signed, received, and approved. It also has the cash with the application. Note cash with application only shows when payment is made by check.

Using the New Business Pending Reports

Issue Information

The Issue Information area contains the dates the policy is issued, printed, mailed, put in force and effective. It also contains the issued class of the policy, modal premium, and payment method. Note: effective date reflects the date the coverage will be effective if the status is pending, approved, or issued. If the status is inforce, the effective date reflects the date the coverage is put in force. Note: The effective date can change during the issue process.

Requirement

The Requirements area is used to communicate between the agent and FLA. This area contains any requirement needed to process this application, the date it was requested, ordered, and received, as well as a comments field. If there is something missing from the application, it will be identified in this area.

The **New Business Pending Reports** should be reviewed daily by all agents who have an application pending.