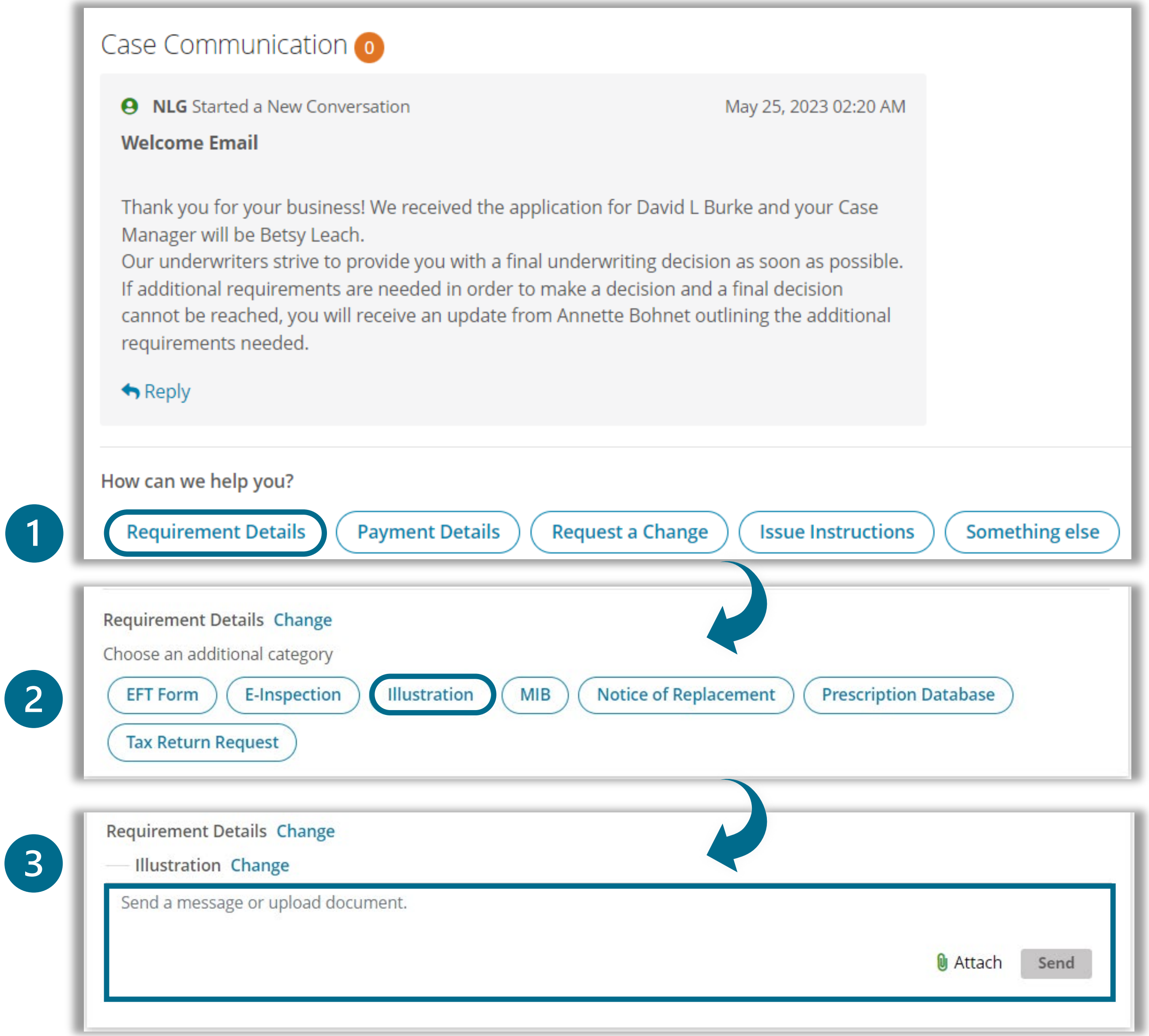
Submitting Case Requirements



For any listed **Pending Requirement** in the **Agent Action Required** section, continue to upload documents directly to the corresponding requirement using the **upload button**.

For any requirement that does **not** have an upload/reply button, or if you need to send a message about one of the requirements, follow these steps to ensure the requirement goes to the right team:

1. Select the "**Requirement Details**" Category

2. Choose the Pending Requirement that you would like to fulfill

3. Add any additional details, questions, or uploads needed to complete the requirement and send to National Life

***Note:** You can always choose the **Illustration** or **EFT** category no matter the status of the case*

Payment Details Category

Depending on the status of your case, you can request the following changes.

For Pending Cases:

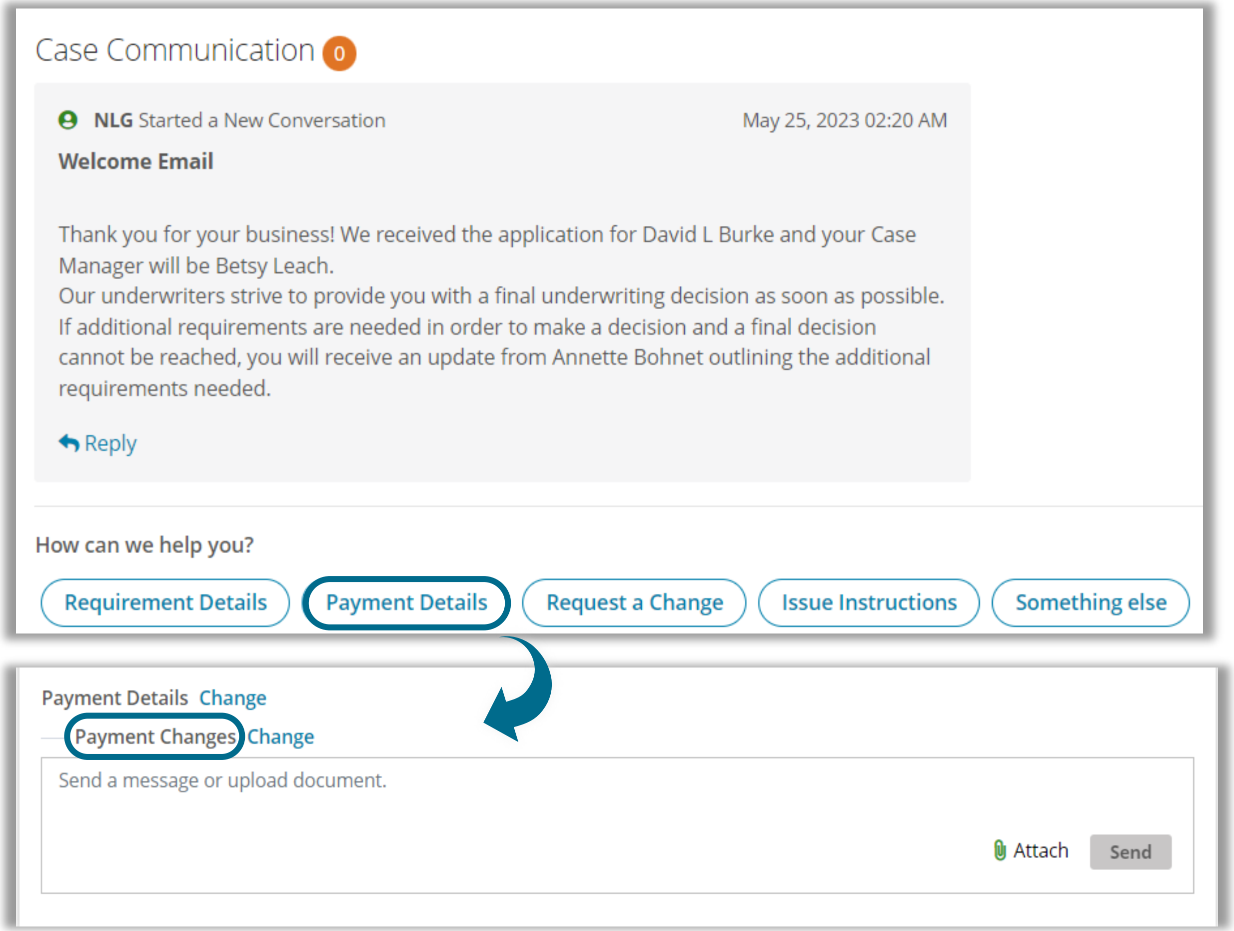
Choose the Category **"Payment Changes"** to:

- Change a Draft Date
- Hold a Draft
- Change Bank Information
- Change the Mode of Payment

For Issued Cases:

Choose the Category **"Payment Changes"** to:

- Stop or Change a Draft
- Change Banking Information
- Adjust the Premium Amount



Request a Change Category

Use this category for any application changes you need to make.

Application Changes:

Use this category to change or correct information including **Name, Date of Birth, Coverage Amounts, and Riders**

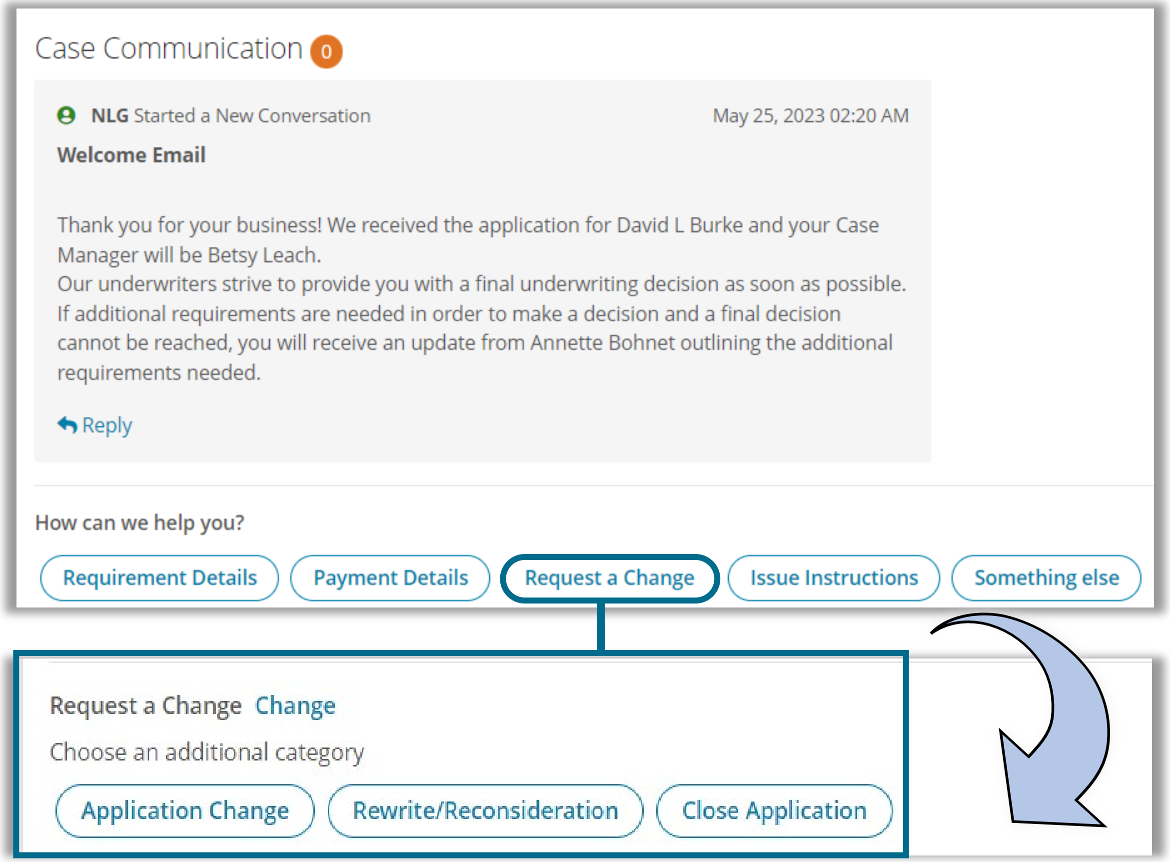
Rewrite/Reconsideration

Use this category if you need to discuss a decision with an **Underwriter** or if you need to make a change to a policy **after issue**

- ***Pro Tip:*** *if the premium amount is the only change needed, use the "Payment Details" category*

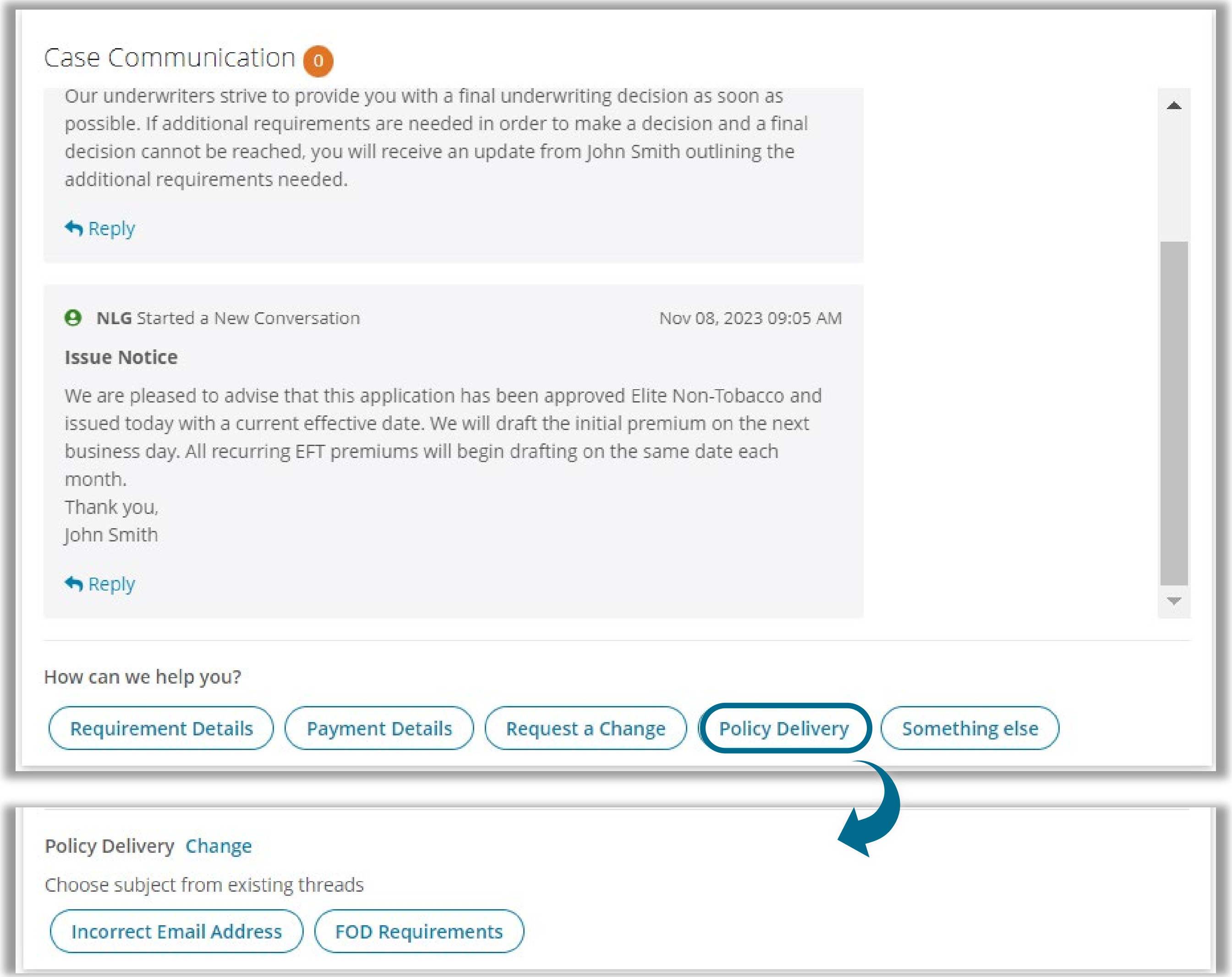
Close Application

You can choose to Close the Application whether the policy is **Pending** or **Approved**



Best Practice: Choose the category **"Issue Instructions"** to communicate final requests or instructions

Policy Delivery Category



This category will only be available after the policy is **issued**.

Use this category to communicate:

- Incorrect Email Address for eDelivery
- Questions about Forms on Delivery (FOD) requirements or to upload FODs

Something Else Category

- Use this category **ONLY** if none of the available categories fit your needs.
  - For the most direct routing of messages, the subcategory **Misc** should only be used if no categories apply

Note: Based on your feedback and needs, we will continue to refine the categories available to provide you the best-case routing experience.

If you have suggestions, please provide feedback by emailing Julie Hince Jhince2@nationallife.com or Agentweb@nationallife.com