

Submitting Case Requirements

Case Communication 0

NLG Started a New Conversation May 25, 2023 02:20 AM

Welcome Email

Thank you for your business! We received the application for David L Burke and your Case Manager will be Betsy Leach. Our underwriters strive to provide you with a final underwriting decision as soon as possible. If additional requirements are needed in order to make a decision and a final decision cannot be reached, you will receive an update from Annette Bohnet outlining the additional requirements needed.

[Reply](#)

How can we help you?

1 **Requirement Details** Payment Details Request a Change Issue Instructions Something else

Requirement Details [Change](#)

Choose an additional category

2 **EFT Form** E-Inspection **Illustration** MIB Notice of Replacement Prescription Database Tax Return Request

Requirement Details [Change](#)

— **Illustration** [Change](#)

Send a message or upload document.

[Attach](#) [Send](#)

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

The screenshot displays a user interface for case communication. At the top, it says 'Case Communication' with a notification badge '0'. Below this, a message from 'NLG' is shown, dated 'May 25, 2023 02:20 AM'. The message is titled 'Welcome Email' and contains the following text: 'Thank you for your business! We received the application for David L Burke and your Case Manager will be Betsy Leach. Our underwriters strive to provide you with a final underwriting decision as soon as possible. If additional requirements are needed in order to make a decision and a final decision cannot be reached, you will receive an update from Annette Bohnet outlining the additional requirements needed.' Below the message is a 'Reply' button. Underneath the message, there is a section titled 'How can we help you?' with five buttons: 'Requirement Details', 'Payment Details', 'Request a Change', 'Issue Instructions', and 'Something else'. The 'Payment Details' button is highlighted with a blue border and a blue arrow points from it to the 'Payment Details Change' section below. This section has a breadcrumb trail 'Payment Details > Change' and a sub-section 'Payment Changes > Change'. Below this is a text input area with the placeholder 'Send a message or upload document.' and an 'Attach' button with a paperclip icon and a 'Send' button.

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**

The screenshot shows a 'Case Communication' interface. At the top, it says 'Case Communication 0'. Below that, there is a message from 'NLG' dated 'May 25, 2023 02:20 AM' with the subject 'Welcome Email'. The message content reads: 'Thank you for your business! We received the application for David L Burke and your Case Manager will be Betsy Leach. Our underwriters strive to provide you with a final underwriting decision as soon as possible. If additional requirements are needed in order to make a decision and a final decision cannot be reached, you will receive an update from Annette Bohnet outlining the additional requirements needed.' There is a 'Reply' link below the message. Below the message, there is a section titled 'How can we help you?' with five buttons: 'Requirement Details', 'Payment Details', 'Request a Change', 'Issue Instructions', and 'Something else'. The 'Request a Change' button is highlighted with a blue border. A blue arrow points from this button to a sub-menu that appears below it. This sub-menu has the title 'Request a Change Change' and the text 'Choose an additional category'. It contains three buttons: 'Application Change', 'Rewrite/Reconsideration', and 'Close Application'. A large blue arrow on the right side of the sub-menu points downwards, indicating the next step in the process.

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

Policy Delivery Category

Case Communication 0

Our underwriters strive to provide you with a final underwriting decision as soon as possible. If additional requirements are needed in order to make a decision and a final decision cannot be reached, you will receive an update from John Smith outlining the additional requirements needed.

[Reply](#)

NLG Started a New Conversation

Nov 08, 2023 09:05 AM

Issue Notice

We are pleased to advise that this application has been approved Elite Non-Tobacco and issued today with a current effective date. We will draft the initial premium on the next business day. All recurring EFT premiums will begin drafting on the same date each month.

Thank you,
John Smith

[Reply](#)

How can we help you?

Requirement Details

Payment Details

Request a Change

Policy Delivery

Something else

Policy Delivery [Change](#)

Choose subject from existing threads

Incorrect Email Address

FOD Requirements

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

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[Reply](#)

How can we help you?

[Requirement Details](#) [Payment Details](#) [Request a Change](#) [Issue Instructions](#) [Something else](#)

Something else [Change](#)

Choose subject from existing threads

[Licensing & Contracting Info](#) [Agent Changes](#) [Misc](#)