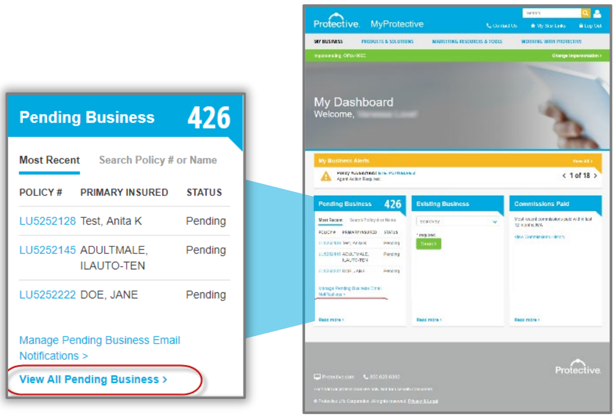
Pending Business Website Guide

Tracking pending business is easy. Once business is submitted, you will be able to keep track of the status of the applications, review outstanding requirements, and upload documents using the Pending Website. You can access Pending through the MyProtective dashboard or through the EZ-App℠ dashboard.

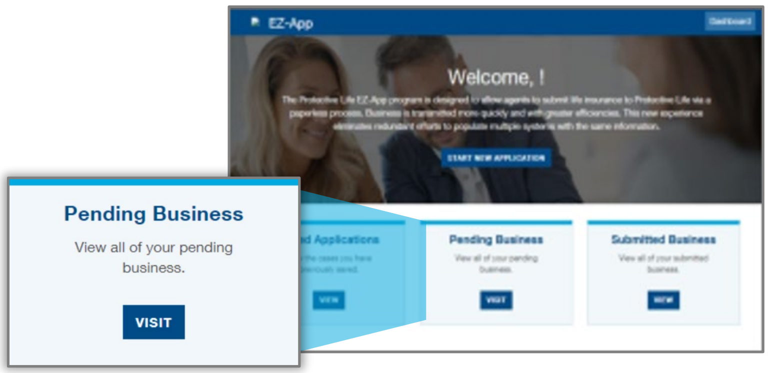
MyProtective Dashboard

From the MyProtective dashboard, click on **View All Pending Business** located in the Pending Business tile.



EZ-App℠ Dashboard

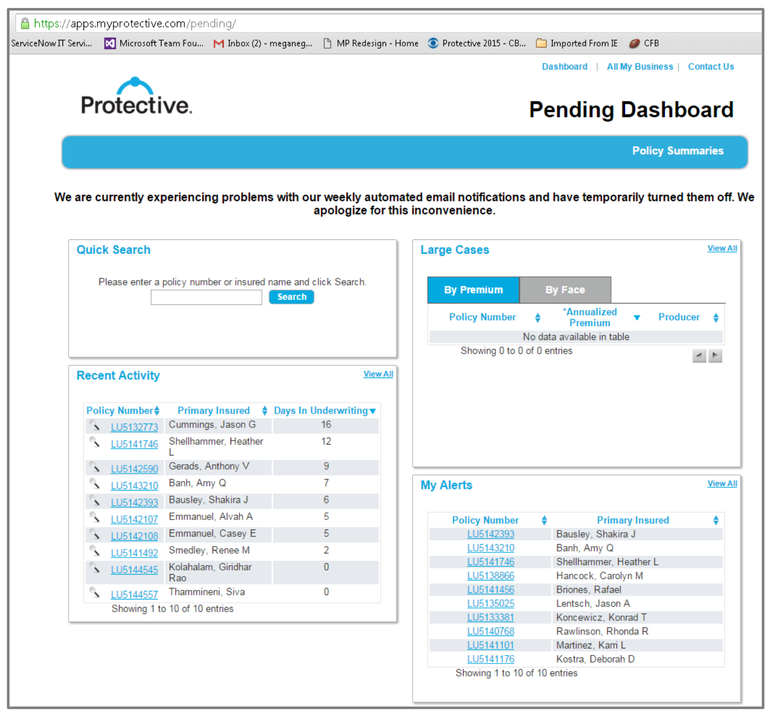
From the EZ-App dashboard, view all of your pending business by clicking on the **VISIT** button located in the Pending Business tile.



Pending Dashboard

The Pending Dashboard allows you to do a quick search by policy number or insured name, and review recent activity on your submitted policies. Large cases and alerts are also shown on the dashboard.

Click on a policy number to go to the policy details screen. Or click the magnifying glass next to the policy number to see a quick summary about the policy.



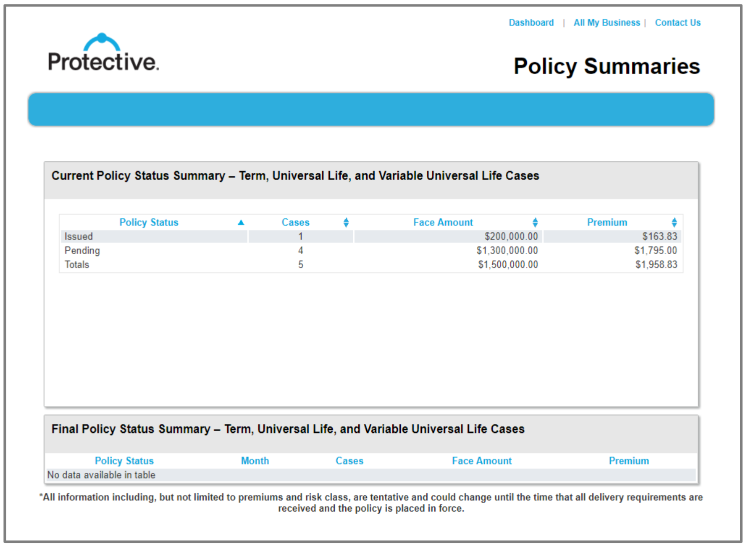
Tip: Click on Policy Summaries in the blue bar to see totals for the number of cases approved, issued or pending.

Pending - Life

Policy Summaries

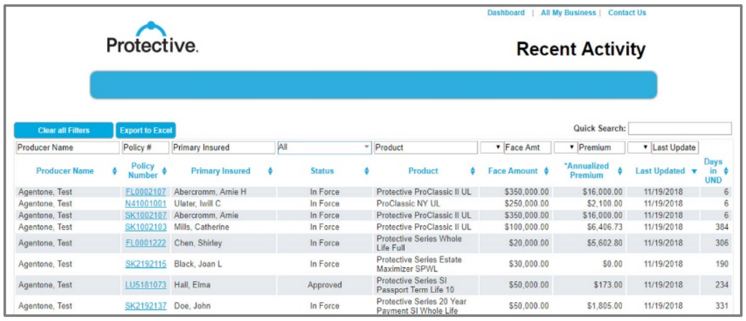
The policy summary view shows the number of policies by current status. Including total face amount and premium. Click Dashboard at the top of the page to return to the Pending Dashboard.

Note: The premium amount will not display in Pending until the signed application packet is received.



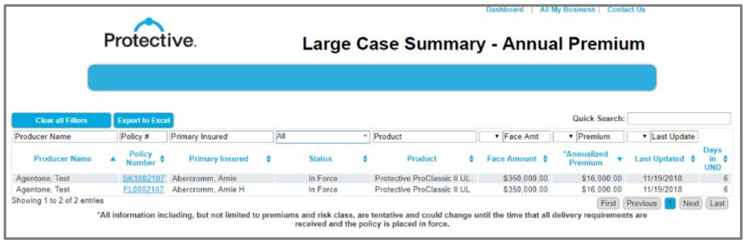
Recent Activity

Recent activity contains life policies that have had a recent change, including a status change, a requirement change, or the addition of a note.



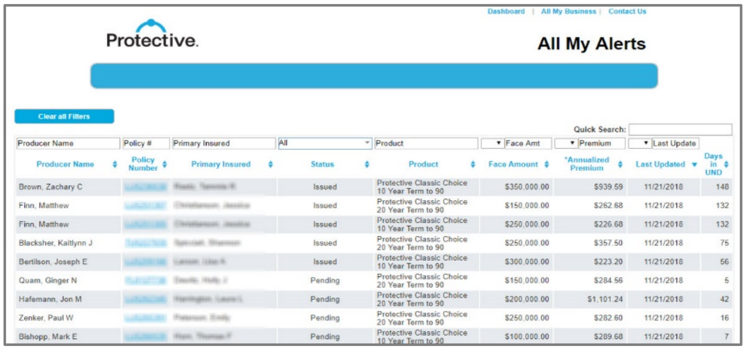
Large Case Summary

Recent activity contains life policies with at least $10,000 in premium or at least $500,000 face amount.



All My Alerts

All My Alerts contains life policies with outstanding requirements that are the responsibility of the agent.



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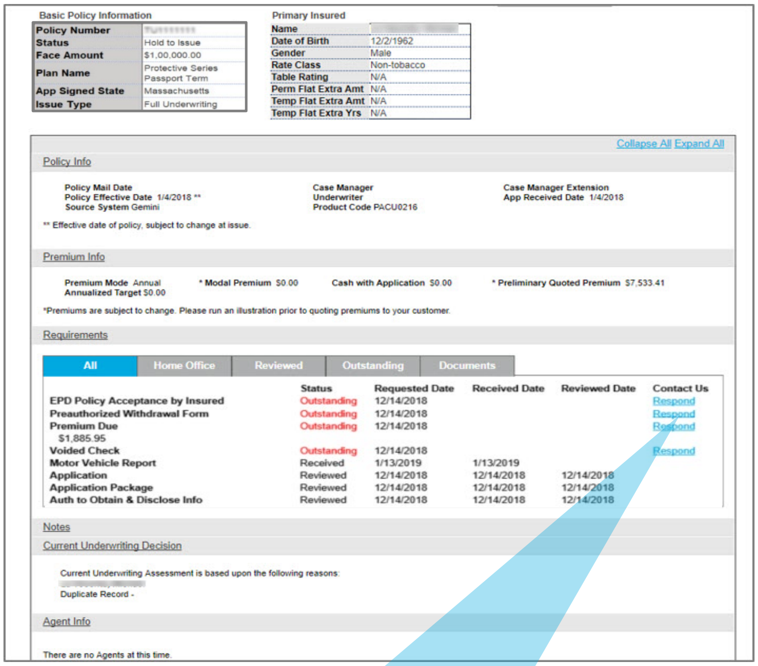
Pending - Life

Policy Details Page

The policy details page shows policy information, premium information, requirements, notes, and the current underwriter decision.

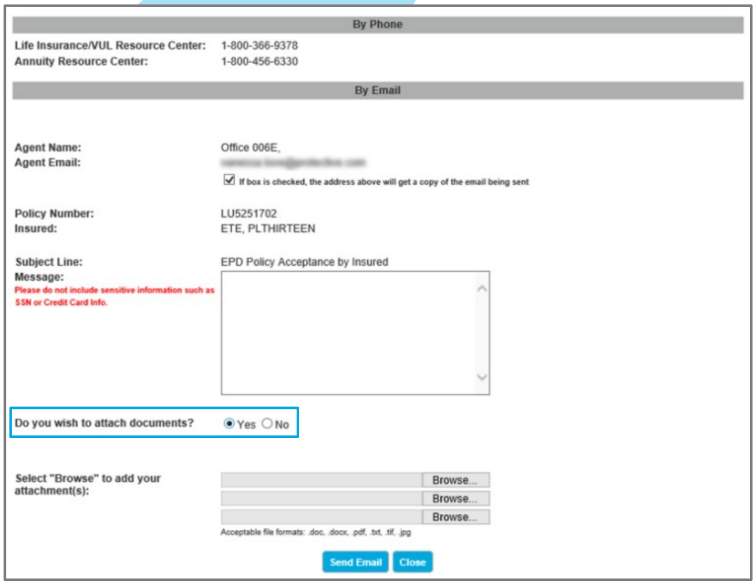
Tip: Updates occur every 5-15 minutes.



Upload document / send correspondence

Outstanding requirements are noted in red under the status column. To upload a document or to send correspondence regarding the item, C**lick the blue Respond link** located under the **Contact Us column.**

If you want to upload a document, **choose Yes** to the question "Do you wish to attach documents. Select Browse to attach the document. Then **click Send Email**.



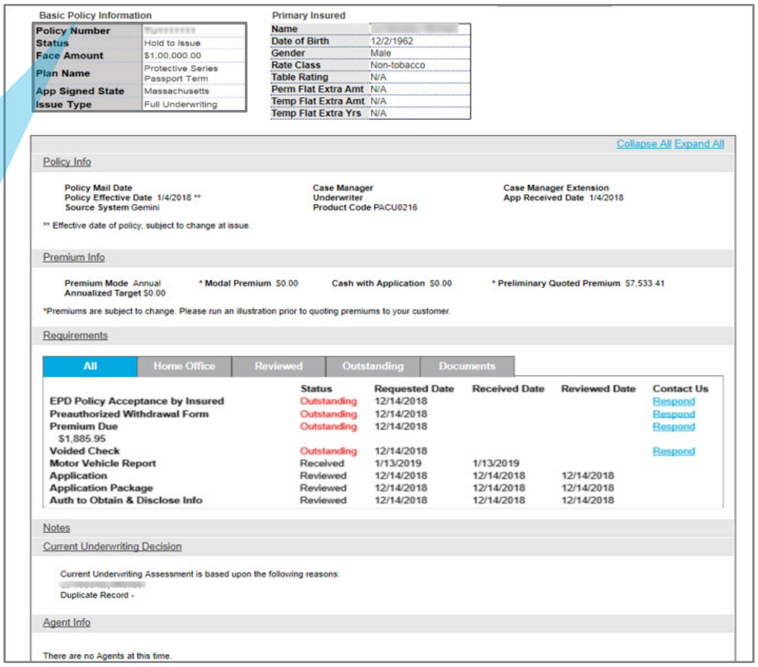
Note: Documents received are processed within 24 hrs.

Pending - Life

Basic Policy Information Box

The Basic Policy Information box provides a snapshot of the policy information and status.

Policy Number	
Status	Hold to Issue
Face Amount	$1,00,000.00
Plan Name	Protective Series Passport Term
App Signed State	Massachusetts
Issue Type	Full Underwriting



Basic Policy Information

Policy Number	
Status	Hold to Issue
Face Amount	$1,00,000.00
Plan Name	Protective Series Passport Term
App Signed State	Massachusetts
Issue Type	Full Underwriting

Primary Insured

Name	
Date of Birth	12/2/1962
Gender	Male
Rate Class	Non-tobacco
Table Rating	N/A
Perm Flat Extra Amt	N/A
Temp Flat Extra Amt	N/A
Temp Flat Extra Yrs	N/A

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Policy Info

Policy Mail Date
Policy Effective Date 1/4/2018 **
Source System Gemini

Case Manager
Underwriter
Product Code PACU0216

Case Manager Extension
App Received Date 1/4/2018

** Effective date of policy, subject to change at issue.

Premium Info

Premium Mode Annual
Annualized Target $0.00

* Modal Premium $0.00

Cash with Application $0.00

* Preliminary Quoted Premium $7,533.41

*Premiums are subject to change. Please run an illustration prior to quoting premiums to your customer.

Requirements

All | Home Office | Reviewed | Outstanding | Documents

	Status	Requested Date	Received Date	Reviewed Date	Contact Us
EPD Policy Acceptance by Insured	Outstanding	12/14/2018			Respond
Preauthorized Withdrawal Form	Outstanding	12/14/2018			Respond
Premium Due $1,885.95	Outstanding	12/14/2018			Respond
Voided Check	Outstanding	12/14/2018			Respond
Motor Vehicle Report	Received	1/13/2019	1/13/2019		
Application	Reviewed	12/14/2018	12/14/2018	12/14/2018	
Application Package	Reviewed	12/14/2018	12/14/2018	12/14/2018	
Auth to Obtain & Disclose Info	Reviewed	12/14/2018	12/14/2018	12/14/2018	

Notes

Current Underwriting Decision

Current Underwriting Assessment is based upon the following reasons:

Duplicate Record -

Agent Info

There are no Agents at this time.

Policy Status Definitions

When a file reaches a final status for 32 days (Withdrawn, Incomplete, In-force, Declined, Postponed, Not Taken), it will automatically be removed from the Pending site. If the file is reopened, it will return to the Pending site.

Pending - Initial status when the ticket is dropped.

Approved - Once it is approved by the underwriter it will show Approved.

Hold to Issue - Approved waiting on a companion or if it is approved less than applied waiting on the offer to be accepted.

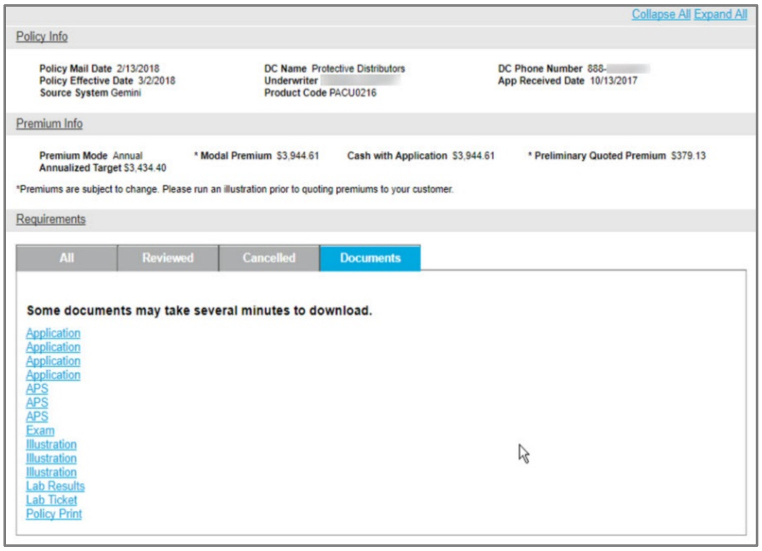
Issued - Once the policy is issued.

Inforce - Once the policy has been delivered and all delivery requirements are received the policy will be placed Inforce.

Withdrawn - Offer not accepted by client.

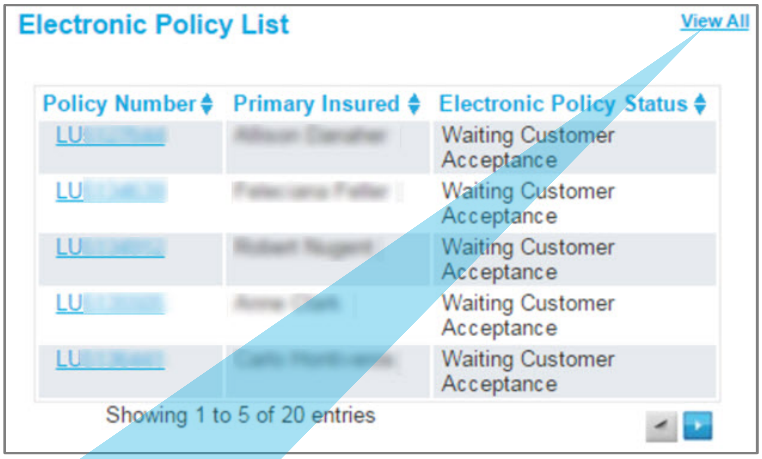
Policy Documents Tab

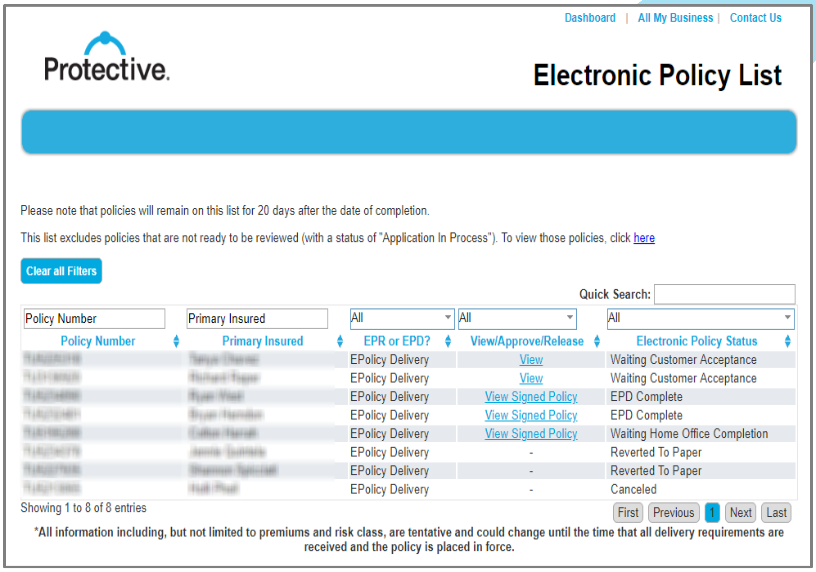
The policy documents page shows all documents received related to the case.



Electronic Policy List

The electronic policy delivery list shows the status of the electronic policy delivery. Click View All to see an expanded list. The expanded list includes information on the electronic policy status, and links to view, approve or release the policy.



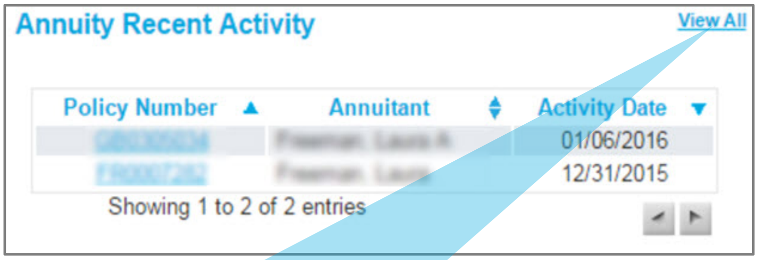


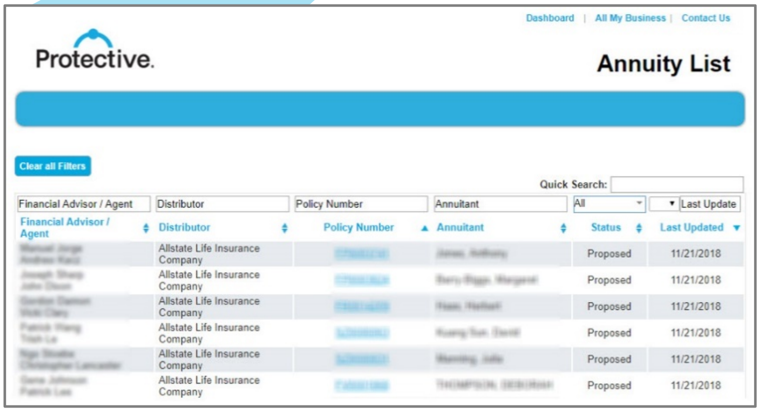
Pending - Annuity

Pending Annuity Activity

You can view your pending annuity activity from the dashboard. The pending annuity information contains annuities submitted as 1035 exchanges only. **Click View All** to see an expanded list. To check the status on any annuity business submitted, click **Contact Us**. See **Uploading Annuity Documents** below for details.

To see details about a pending annuity application, **click on the policy number**. The Annuity Details screen will open where you will find detailed information regarding the status and any comments related to the contract.

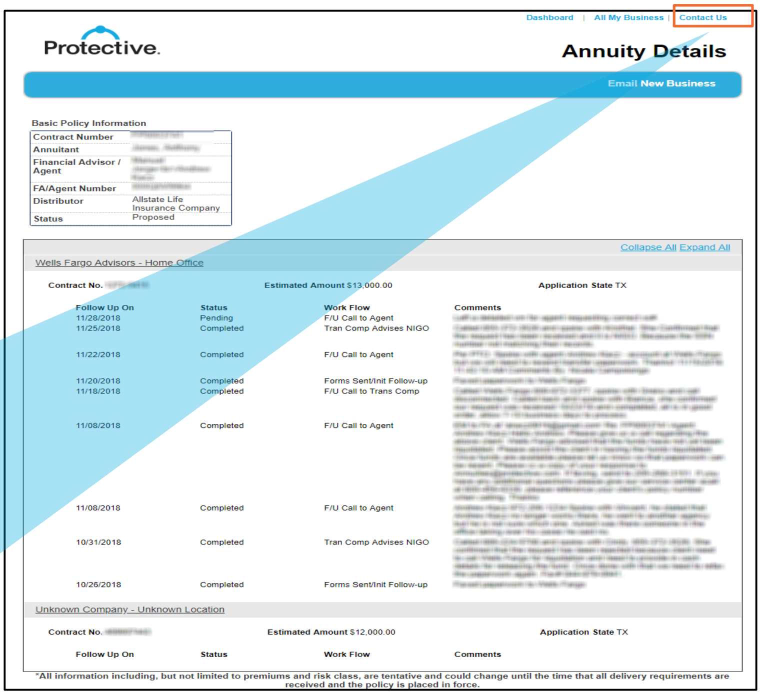


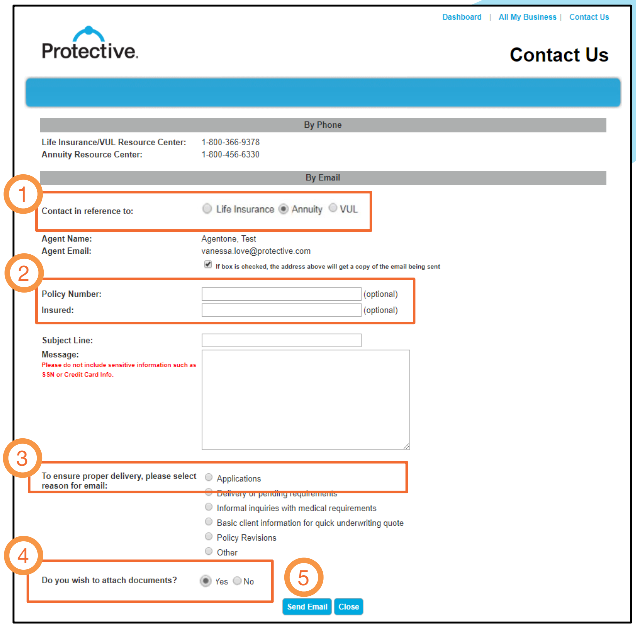


Uploading Annuity Documents

Click **Contact Us** at the top of the screen to upload documents on **any** annuity.

1. Choose Annuity in the reference to field
2. Enter the EZ-App[SM] tracking number and/or the customer's name
3. Select Applications as reason for the email
4. Select Yes to attach a document (Browse will open – attach documents)
5. Submit Email

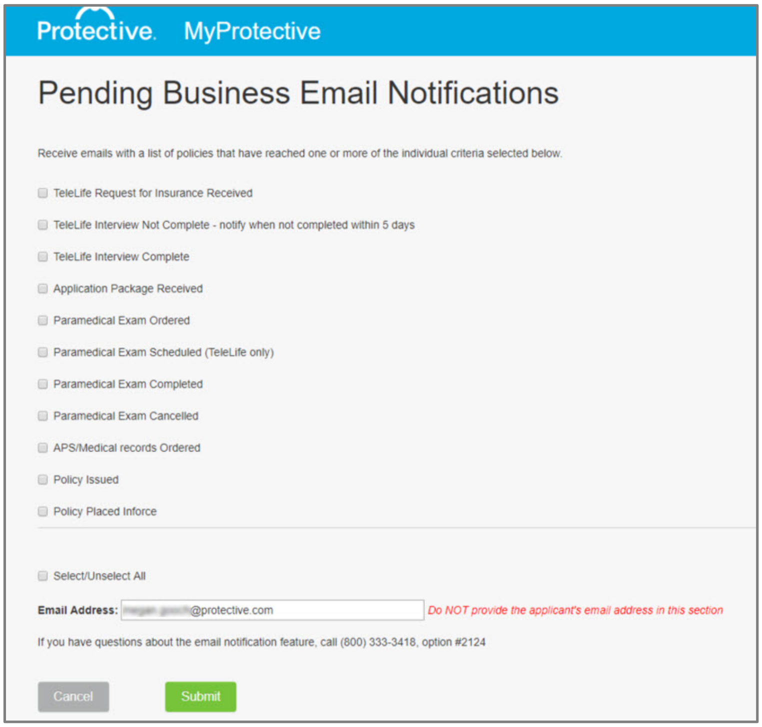




Note: If you call the Annuity Resource Center for a status update you will need to provide the customers name or SS# instead of the EZ-App tracking number.

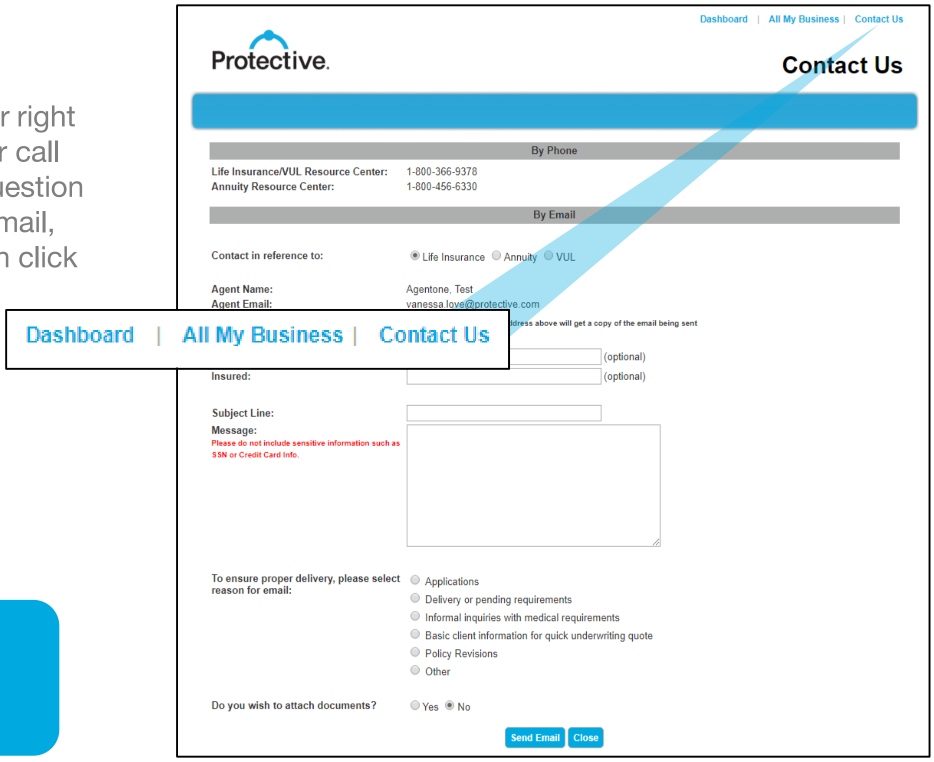
Pending Business Email Notifications

You can opt in or out to receive status updates as an application goes through the process. To opt in or out, and to customize the emails you receive, go to the MyProtective dashboard, and navigate to the user preferences section.



Contact Us

For questions regarding your pending business, click Contact Us in the upper right hand side of the screen. You can either call the Resource Center or submit your question or request via email. If submitting an email, complete the applicable fields and then click Send Email.



Tip: Upload documents from any page using the Contact Us. Documents received are processed within 24 hrs.

Pending – Other Features

Added features of the Pending System:

- Customizable status alerts
- Updates occur every 5-15 minutes
- Greater policy detail on case status
- Policy documents are available for the agent to print
- Snap shots of recent life policies submitted, large cases, and alerts are right on the pending business dashboard
- Electronic signature life applications can be viewed in pending business as soon as the agent submits (prior to customer signing)
- Status of all your submitted annuity 1035 exchange business
- Status information for electronic policy delivery
- Ability to upload documents for pending life and annuity business

For additional support, contact the Internal Wholesaler Desk at: 800-500-7229.

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