

Easy and convenient: Velocity's client journey

When submitting a Velocity digital application, you can opt-in for your clients to complete the Part II medical questions online. Here's what that journey looks like:



Complete application

Client meets with agent to complete the drop ticket.



Initial communication

Client receives email and text with a link to register their MyAccount and next steps to complete their interview.



Create account

Client creates an account that will be used for the life of the policy for which they are applying.



Sign in to account

Once the client signs in, they will be given the option to select "Complete my Interview" or "Track my application."



Complete medical questions

Client completes questions related to their health and lifestyle.



Review, edit, and complete part 1 information

Client reviews prepopulated information submitted on the drop ticket and completes any missing fields highlighted in red.



Complete HIPAA Client completes HIPAA ceremony.

Once HIPAA is complete, it will no longer be accessible.



Review honesty and electronic statement

Client acknowledges their honesty statement and agrees to doing business electronically.



Review and finalize interview

Client reviews and confirms answers.

Once confirmed, no changes can be made to the application until after signatures are finalized.



Exam requirement notification

Client will be notified if an exam is required based on their interview.



Complete interview

Client signs their application packet via Adobe electronic signatures.



Schedule exam

If exam is required, client will receive a phone call from an Exam Vendor to schedule their appointment.



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To learn more about Protective's Velocity suite of digital tools, contact your Protective representative.

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