

Quick eApp

Frequently Asked Questions

MINNESOTA LIFE

A Securian Company

What is Quick eApp?

Minnesota Life's Quick eApp is a simplified application process where all the application information is inputted electronically, allowing the advisor to spend more time selling and less time on paperwork. The electronic signature and submission process allows a faster turnaround time and ensures everything is 'In Good Order.'

What products can use Quick eApp?

Currently, the Quick eApp is available for Advantage Elite Select Term, AUL, AVUL, Eclipse, Eclipse Protector, and Secure Whole Life.

In what states is Quick eApp available?

Quick eApp is available in all states except New York.

What type of situations work best with Quick eApp?

All situations work with Quick eApp. Quick eApp uses an electronic signature process. Your client needs to be comfortable with online transactions. If they happen to not be with you at the time the application is taken, they will need to have an email address.

What eSignature Options are available?

There are several options to complete the eSignature process. This process eliminates the need for "wet signatures", as well as mailed or faxed applications.

Face to Face

- All applicants must be present.
- ID required.
- Application can be eSigned immediately.

eSignature combo

- Combines Face to Face method with traditional eSignature.
- One or more applicants are not present.
- Those available eSign immediately (ID required).
- Those not present provide eSignature via email process.

eSignature via email

- None of the applicants are present.
- An email with a link to a secured website is delivered to the applicants.
- They follow a few easy steps to electronically sign the application.
- Once eSigned, the application will be securely transmitted back to you. You eSign it and forward to Minnesota Life via a secured channel.

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Do I have to use Quick eApp?

Quick eApp is required for Advantage Elite Select cases under \$250,000. For all other policies, we strongly recommend using it, as it increases efficiency and ensures accuracy.

How do I access Quick eApp?

It can be accessed via the Quick eApp page on your advisor web site.

You can also access Quick eApp directly from the forms engine web site for approved products and states. On the forms engine site, you will enter in the request type, product type and state. A new Quick eApp button will appear. Click on the Quick eApp button and you will be automatically sent into the system. No additional sign-on is required.

What is the process for submitting a Quick eApp?

Once you obtain all your clients eSignatures and you apply your eSignature, you will see a button that says 'Send to Carrier.' Click that button and the rest is up to us.

How is the Part 2 of the application completed?

Part 2 of the life insurance application is completed using a Tele-Interview. This process takes on average 20-25 minutes to complete. Please refer to the client flyer '**Quick eApp - The application process - what's next?**' for the list of information your client should have available during the call.

Do I still need to order the medical information for underwriting?

By using Quick eApp, you no longer need to order the medical information for the client. This is all part of the Quick eApp process.

How do I know if I've submitted all of the required information?

This process prevents you from submitting an application unless all of the required information is entered. Quick eApp ensures that your application is complete by displaying green checkmarks next to the required information. You are then able to submit the application.

How do I track the application while it's being processed?

You may track submissions for your client's application or eSignature status when you log in to the Quick eApp system.

- Click on the 'View My Cases' button. You will see a list of your active submissions.
- In order to check the application status of any submission, simply click on your client's name.
- For applications sent to the client for eSignature, you can check the status by clicking on the eSignature button.
- All submitted applications generate updates automatically when the client eSigns the application.
- Errors in the eSign process also generate an automatic update.

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How do I save a copy of the application for my administrative file?

When you complete the eSignature process, you have the option to print or save the application. This is the best time to have a copy made for your records. In the event you don't make a copy, you will have access to the completed request for 120 days in your My Cases view. Select the client that you are interested in and select view forms. You can save or print from this view as well.

How do I resend a link for the eSignature email in the event my client didn't complete the process within 7 days?

Within My Cases, in the upper left, click on the eSignature button. The status button should say pending. Click on the '+' sign next to the client where you want to resend the information, click resend. **NOTE:** If you need to send the link to an agent, you may change the status in the drop down box to Pending Agent Signature and follow the same procedures.

My client called and they can't see their application during the eSignature process.

Please make sure that your client has "Pop-Ups" enabled on their computer. On their web browser, under tools, select Pop-Up blocker and make sure it is turned off. They may have a yellow bar near the top of the browser window with a warning message. They can initiate a right click on their mouse and select to temporarily allow pop-ups from this site.

How can I submit one application for multiple products on a client?

Please contact your New Business Coordinator to discuss option and to assist you in completing the application so that the medical requirements are ordered correctly.

How do I remove a completed or inactive case from "My Cases" view?

After 120 days, the file will automatically be purged from your system.

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Minnesota Life Insurance Company

A Securian Company

www.minnesotalife.com

400 Robert Street North, St. Paul, MN 55101-2098 • 651-665-3500 • 651-665-4488 Fax

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