

OneAmerica Sales Connection

eApp Submission Guide

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Welcome to OSC!

If you have any questions or issues as you use the new OneAmerica Sales Connection (OSC) tool please contact the Producer Resource Center for assistance at 877-999-9883.

eApplication Submission

Once you have completed an eApp and obtained the e-signatures the last step will be to click the “Submit iGo Application” to submit the application directly to the OneAmerica home office. After submitting the application to the home office you will want to forward a copy of it to your office administrator for the ordering of underwriting requirements.

To do this, there are three processes you can use to ensure that your office administrator receives a copy of your submitted e-Apps. Those three processes are summarized here:

1. Prior to e-App Submission – Face To Face Signature Method

In Step 3 of the face-to-face signature process, click on the “Print Signed Application” link (identified by the blue arrow on the screen sample below) to open a PDF of the signed application. This PDF may be saved as a file on your hard drive and emailed to your office administrator, or printed and faxed/mailed to your office administrator.

Step 3 of 4:

[Click to Apply eSignatures](#) [Print Signed Application](#)

Please select the 'View Forms' button to view the Signed Application or use one of the navigation buttons above for other menu options.

2. Prior to e-App Submission – Email Signature Method

On the producer email screen, click the “Print Signed Application” link (identified by the blue arrow on the screen sample below) to open a PDF of the signed application. This PDF may be saved as a file on your hard drive and emailed to your office administrator, or printed and faxed/mailed to your office administrator.

Apply e-Signature

I, John Test

- I certify that to the best of my knowledge and belief the answers on the application and in the statement are true and correct; and
- I am signing the Replacement Notice, if any; and
- I am the agent who solicited the application and hereby sign it.

Please enter the city and state where you are signing the application.

Signed at City Signed at State

Step 1 of 2

Apply e-Signature

Decline e-Signature

[Print Signed Application](#)

Warning: Your Application needs to be Submitted.

Step 2 of 2

Submit iGO Application

3. After e-App Submission

Go to the “My Cases” screen and click on the name of the case (note that the case status shows “Complete”) to launch that case’s final “Application” screen (note that all entry fields are grayed-out). Click on the “View Forms” button (identified by the blue arrow on the screen sample below) to open a PDF of the signed application. This PDF may be saved as a file on your hard drive and emailed to your office administrator, or printed and faxed/mailed to your office administrator.

The screenshot shows the 'Application' screen with a sidebar on the left containing a list of items: Family History-PI, HIV Consent-PI, Existing Insurance, Existing Insurance Cont., Premium Information, Temporary Insurance Agreement, Policy Owner Ack., Third Party Notes, Representative Information, Representative Statement, Validate And Lock Data, Agent Instructions, Signature Method, eSig Disclosures, eSignature Consent, and eSignatures (checked). The main content area has a 'Back' button and a 'Save' button. Below these are sections for 'Insured(s) Agreement' and 'Agent Agreement'. The 'Insured(s) Agreement' section contains a paragraph of text and a checked checkbox for 'Primary Insured'. The 'Agent Agreement' section contains a paragraph of text and a checked checkbox for 'Agent'. A blue arrow points to the 'View Forms' button in the top right corner.

View Open Cases

Until an electronic application is submitted to OneAmerica, OSC tracks the status of your case. You can check on case status by clicking on the “View Cases” button from virtually any screen in OSC. Once on the “My Cases” screen, you will see all of your saved cases listed by name, carrier, product, status, and date modified (see screen shot below). The status column indicates the current status of each case, including: started, locked, pending signatures, pending agency approval, submitted, etc.

<input type="checkbox"/>	Name	Carrier	Product	Status	Date Modified ▼
<input type="checkbox"/>	Smith, John \$250k term case on husband		AP Plus 20	Started	01/26/2012
<input type="checkbox"/>	Jones, Kevin 10-year term w/ \$500k face		AP Plus 10	Started	01/26/2012
<input type="checkbox"/>	Miller, Tom Legacy w/ \$500k face amount		Legacy	Started	01/26/2012

Please remember that OSC’s Applications system is designed to complete and deliver an electronic application to OneAmerica... but nothing beyond that point. Once submitted, your e-App’s status is no longer updated by OSC. When your e-App arrives at the OneAmerica home office, it will be treated like any other application you would normally submit. Keeping this in mind, you should follow-up on your e-Apps in the same manner as you normally would follow-up on any application, including checking Online Services for any outstanding requirements and policy issue status.

Pending Cases At Online Services

After your case is submitted to the home office, you will track this case as you have in the past by checking the status on Online Services. To get to the ‘Pending’ section of Online Service, click on the ‘Pending’ tab under the ‘My Business’ heading.



Once in the Pending section of Online Services, you can access your cases by entering your producer code or last name. Once entered, you will see a summary of all pending cases with detail for each one. All outstanding requirements are noted with requirements needed to pay compensation highlighted in green.

Policies for Producer Number

Search Criteria:

New Business Scoreboard - Last 30-day Averages for Life Business

	Application Entry	Initial U/W Review	Gather U/W Requirements	U/W Decision	Policy Issue & Mail	Total Processing Time
My Business	1.0	0.8	25.0	0.5	4.0	31.3
Individual Operations	1.7	0.9	15.1	2.0	3.6	23.2
Service Standard	1.5	1.0	20.0	1.0	3.0	26.5

John Agent (12345)

Disposition: Sort:

Once you are on this page, you can scroll through all of your pending cases to see what (if any) pending requirements are needed for each case (e.g. bank draft authorization form, voided check, initial premium, signed illustration, etc). You will also notice that information for each pending case is viewable – insured name, policy number, face amount, annual premium, underwriter. There is also a ‘Contact Us’ which provides the e-mail address and phone number for the underwriting area.

Policy: Policy Type: LIFE

Insured: Face Amount:

Premium: Customer Service: [CONTACT US](#)

Underwriter:

Submit Requirements

May Obtain at Delivery

Insured Name	Requirement	Needed to Pay Comp	Date Ordered	Status	Date Received	Comments
<input type="text" value=""/>	DELIVERY REMINDER	NO	02/15/2012	PENDING		UNDERWRITER ADVISED OKAY TO KEEP OPEN UNTIL MID-MARCH WITH GOOD HEALTH STATEMENT.
<input type="text" value=""/>	BALANCE OF PREMIUM	YES	12/20/2011	PENDING		\$919.60 INITIAL APP PREMIUM DUE
<input type="text" value=""/>	PROXY DELIVERY RECPT	NO	12/20/2011	PENDING		
<input type="text" value=""/>	CERT OF INSURABILITY	YES	12/19/2011	PENDING		PLEASE COMPLETE AT TIME PREMIUM IS COLLECTED.
<input type="text" value=""/>	BANK DRAFT AUTH FORM	YES	12/01/2011	PENDING		
<input type="text" value=""/>	SIGNED ILLUSTRATION	YES	12/01/2011	PENDING		ALL PAGES NEEDED
<input type="text" value=""/>	VOID CHECK	YES	12/01/2011	PENDING		

Thank you for using OneAmerica’s Sales Connection system! For assistance or to provide feedback regarding OSC, please contact OneAmerica’s Producer Resource Center at (877) 999-9883 or via prcenter@oneamerica.com.