

Electronic Application (eApp) Quick Start

How to Access the eApp

Our eApp was developed to replicate the paper application that you are already familiar with. It is housed within ADDS® (Agency Data Distribution System) under the eApp tab on the far right of the screen.

The screenshot shows the Bankers Fidelity eApp interface. The top navigation bar includes: Home, Reports, Commissions, Online Ordering, Library, My Profile, Premium Billing, Tools, and eApps. The eApps tab is selected, showing 'Online Application' and 'Saved Applications' options. The 'Senior Security eApps' form is displayed with the following fields and callouts:

- State:** IOWA (Callout: Select the state the application will be signed in.)
- Application:** BFLIC Med Sup App (Callout: To start a new application select "Online Application" from the eApps tab.)
- Product(s):** MEDICARE SUPPLEMENT (Callout: Choose the application/product.)
- Company:** Bankers Fidelity Life Insurance Company (Callout: Make sure you are under the correct writing # (BFAC/BFLIC) for the application you are writing.)
- Writing #:** 616657 (Callout: Make sure you are under the correct writing # (BFAC/BFLIC) for the application you are writing.)
- Proceed** button (Callout: Click "Proceed.")

Minimal information required to get a quote.

The screenshot shows the 'Minimal information required to get a quote' form. It includes the following fields and callouts:

- Date Of Birth:** 01/01/1953
- Requested Effective Date:** 12/01/2018
- Zip Code and Residence State:** 50266, IOWA
- Gender:** Female
- Is the Proposed Insured eligible for coverage under the "Open Enrollment" period (the six month period beginning with the first month in which the Proposed Insured is both age 65 or older and enrolled in Medicare Part B)?:** Yes
- Is the Proposed Insured eligible for coverage under the 63-day "guarantee issue" period?:** No
- Has Proposed Insured used any tobacco products in the last 3 years?:** No
- Medicare Supplement Rates:** PREFERRED
- Medicare Supplement Plan:** G
- Household Discount:** No
- Agent Split:** No
- Premium Mode:** Monthly Bank Draft

At the bottom are buttons for **Get Quote** and **Create App**. A callout box says: "Enter all required information and select "Get Quote.""

A **Premium Details** table is shown:

Product(s)	Premium
MEDICARE SUPPLEMENT PLAN G	\$86.07
Total:	\$86.07

Callout: "You will be presented with a quote. You can modify any field and select "Get Quote" again or select "Create App" to proceed to the application. The information you have entered will be automatically synced into the application."

You can discard the application at any time and start over if you need to.



Across the top of the application, you will notice a set of tabs; each tab noting a required task.

“Save and Continue” takes you to the next tab. **Save & Continue**

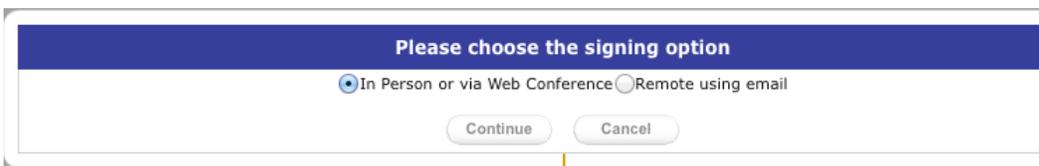
Complete each tab as required. Note: If processing an application for OE/GI, the tab “HIPAA Agreement Form” is not required although it is still shown.

The “Review” tab renders a copy of the application on the screen just as if you printed it out. Any incomplete items within the application will be marked with a red exclamation point. Return to the tab to correct any errors. Any incomplete items must be corrected prior to submitting the application.

When the application is complete, hit “Ready for Signature.” **Ready for Signature**

DocuSign e-signature Process

The “Please choose the signing option” box is going to determine the type of DocuSign event that happens.



If you are sitting face-to-face with the applicant, you would select the “In Person” signature option. You would also choose this option if you are virtually sitting with your client in a web conference, such as Skype, where you still have real-time interaction with them.

The “Remote using email” option allows you to obtain an electronic signature from your client if they are not physically with you when completing the application. With this option, your client will receive an email from DocuSign letting them know that they have received a document that requires a signature.

Tip: If the email from DocuSign doesn’t appear, have your client check their spam folder.

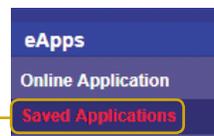
The screen will list the standard instructions to follow for collecting an electronic signature. The first signature block prompts the signer to adopt a scripted e-signature.

- They can opt for the default signature or “sign” their own using the mouse.
- The signer only has to complete the adopt step once. From then on, they just click the “Sign” button.

You are then prompted for signature using a similar signing process.

Saved Applications

You will now find your pending and completed applications in “Saved Applications” under the eApps tab.



This tab shows you each application’s status – whether it is incomplete, pending signatures, or submitted.

Submitted applications will show the pending policy number.

Get Started Now!

Questions? Call our Agent Support Team at 866-458-7503.