eApply User Guide





UN 1663 3-20

For producer use only. Not for use with clients.

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Accessing eApply

To access eApply, open a web browser and login to **Producer Workbench**.

1. You can find the link to eApply in the **Day-to-Day Tasks** by selecting **Prepare for A Sale**. Agents must first be appointed before they are able to access eApply.

Ameritas.	Producer Workbench
Selling & New Business	Client Service Comp &
Day-to-Day Tasl	ks
Sell	
Prepare for a Sale	
Create an Illustration	
Submit New Business	
Check Submission Status	
Calculators	

2. Once on the Prepare for a Sale page, select Go to eApply now under tasks.

Prepare for a Sale	
Insurance Products	Sales Contests »
Whole Life / Term	
Variable Universal Life 💙	Tasks
Fixed Annuities	Go to eApply now
Variable Annuities	Get Forms & Applications
Disability Income	About eApply
Refirement Plans	Get Sales & Marketing Materials
Ameritas Group Division	Software & Illustrations

3. The next screen will require the agent's number, and you will be taken to your eApply home page.

eApply		
Agent: AG00001234	v Login	

ecent Activity	Application
Is - Life Insurance Jet Issue Status Cata Entry Updated 5/18/201	Manage
Tammy MT - Life Insurance Full App Status Cata Entry Updated 5/18/2018	All Activities
Rew york full app - whole life Status Data Entry Updated 5/18/201	13
New Application - Americas Value Plus Term Status Date Entry Updated 5/16/201	
New Application - Ameritas Value Plus Term Status Deta Entry Updated 5/15/201	18
< 1 2 3 4 5 6 >	

eApply simulator

You can also access our eApply simulator where you can practice using the system.

1. You can access this from the **Prepare for a Sale** page by selecting **About eApply**.

Prepare for a Sal	e
Insurance Products Universal Life Whole Life / Term Variable Universal Life Fixed Annuillies	NY Reg 187 and 60 Producer Guide » 🖻 RightBRIDGE (NY only)
Variable Annuities > Disability Income > Rotiromont Plana > Ameritas Group Division	Tasks Go to eApply now Got Forms & Applications
More About Replacement Guidelines	About eApply Get Sales & Marketing Materials Software & Illustrations

2. Here you have access to resources and training videos, as well as the simulator. Select the **Test drive eApply using our simulator** link. The login information is located below the link. *This is a shared environment so do not use actual client or personal data.*



eApply home page



Once on the eApply Home Page, you will be able to see the following:

Recent Activity: Lists the 5 most recent applications started. You will also be able to see the status of each application.

- Data Entry Displays when the application has been started but not at 100% complete yet.
- **Pending Signatures** Displays when the application is at 100% but none of the required signatures have been captured.
- In Signatures Displays when there has been a signature captured, but not all signatures are completed.
- **Complete** Displays when the application has been completed to 100 % and all required signatures are received. In this status, the application has been submitted to us to begin the underwriting process.
- Pending Client Request Displays when the application has been sent to the client to complete.

All Activities: Clicking this will take you to a list of all applications.

meritas.			Hom	ie i	New Activity	All Activities	Preferences Log Of	
0	Week Month	Quarter	<u>YTD</u>	<u>All</u>			Advanced	Clea
iearch Results Iser Ameritas Agent: 175 ac pdated in the last 30 days	tvibes					Status Any	Sort Date	
NY - Tabitha Test (Finding Requeste)	- 05/18				DI Four	dation	Pending Si	gnatures
Last Action E-Signature Request Sent	Last Audit Entr aijfsikj sent em sent to fsd@gm e-Signature. Vie Created: 5/19/2	ry: 5/19/201 ail to request ail.com. Appl rev. History 018	8 9:01 54 e-Signati lication is i	AM ES ire from currently	T ' dasfas'. Email v I locked pending	vas View	Requests Delete	Сору
la - Life Insurance	Jet Issue				Life Ins	urance Jet Issue	Pending Client	Reques
Last Action: E-Request Sent	Last Audit Entr Tab' sent email I need to complet The application View History Created: 5/19/2	y: 5/19/201 to request clip the forms is currently cl 018	8 8 59 30 ent to com The email hecked-ou	AM ES plete th was see it pendir	f e application, clie nt to "client@a.co ng client completi	nt will m. View	Requests Delete	Сору
Tammy MT - Life	Insurance Full A	pp 🚯			Life Ins	urance Full App	D	ata Entr

From here, you can see the status of each application, as well as more details about the last action taken, and the created date. The functions on this page are:

- View Click this to go to the application.
- **Requests** This is available only when there is a pending request that was sent to the client to complete signatures or the application.
- **Delete** This will delete the application out of the system. (Note: this does not delete them from our system if you have completed the application and sent it to us for issue.)
- **Copy** This allows you to take an already-created application and duplicate it. This is useful in situations such as the client previously applying for a Whole Life policy but then decides to do a DI application. It will pull the information into the application.
 - When you select copy, you will have two options. Copy as is or copy with changes.

	Сору	
Copy the selected a	ctivity As Is OR change jurisdict optional forms.	ion, product or
0.000		-

- Copy As Is will create a new application using the same state and same product type.
- Copy with Changes will prompt you to select the state and product type.

Navigation Bar: The navigation bar allows you to log off, view any messages, and has the following available features:

- Home New Activity All Activities Preferences Log Off
- Home Return to the home page from any page you are in.
- New Activity This will take you to create a new application.
- All Activities This takes you to the screen where all applications are listed.
- **Preferences** Here you can change some default preferences, add Mobile Access and set your Redtail username and password.

General			
Default Jurisdiction	Kentucky	My Full Name	
Default Product Type	Life Insurance	My Email Address	Test@ameritas.com
Default Time Zone	EST - Eastern Standard Time		
Page Size for My App. List	10		
Send Message Center Emails	Save		
Send Message Center Emails	Save		
Send Message Center Emails ile Access Add New Device	Save	App	Windows Install
Send Message Center Emails ile Access Add New Device	Save	e Parate App	te ex the Store Windows Install
Send Message Center Emails ile Access Add New Device JV Status: Activated	Save	C Bowerla Mipe Devis	Store Windows Install

New application

Use the **Application** feature under **Start New** to create a new application.

- 1. You will first be prompted to select a Jurisdiction and Product Type from the drop-down lists. This is used to make sure the correct application pages that are required for that state and product are pulled in. The product types are:
 - Life Insurance Used when applying for Whole Life, Universal Life, Term or a combination.
 - **Disability Income** Used when applying for any Foundation or Fundamental Disability product.
 - Combo Used when applying for both a Life and DI product.
 - Corporate Forms Used when applying for a term conversion.
- 2. Once a product and jurisdiction are selected, the next screen will take you to the Required Forms page. This is a list of forms you will be prompted to complete.

From here you will want to select **Create**.

З.



You will get a pop up box where you can name the application. It is recommended to include the client's name when naming the application. This will be what displays on the home page under Recent Activity and in the list of applications in the All Activities page.



4. After Clicking Create, the Application Wizard Screen will appear.

DI and life application wizard screen features

Currently our life and disability product applications are in a "wizard" type format. This means that only the questions that need to be answered are pulled in, based on how you answer previous questions.

Required Form Fields: Required fields will be highlighted in blue and required check boxes will be highlighted in bold. All white fields or check boxes not highlighted in bold are optional.

DAVIAL ENTRAY	2 SIGNATURES		3 FINALIZE			O CONT	TINUE
*		Insure	d				
Insured Persona	I Information						
Prefix First N	ame Middle Nam	e	Last Name	Suffix	Date of Birth		Age
Sender Identifi	cation Type	Driver's Licens	se/Government Issued P	Icture ID	State	Ŧ	
	least quartize						
nsured personal representative or	legal guardian						
nsured personal representative or	regai guardian						
Home Address	regal guardian T						
Home Address	regar guertuan						
Home Address Address Lookup: Enter an address	regar gueroian						
Home Address Home Address Inderess Lookup: Enter an address Iddress Line 1	regar guerdian]					
Address Line 1	regar guerdian]					
Address Lookup: Enter an address Address Line 1 Address Line 2	regar gueroran						
Home Address Home Address Address Lookup: Enter an address Address Line 1 Address Line 2 City	state	Zipcode					
Address Lookup: Enter an address Address Line 1 Address Line 2 City	regar guerolan	Zipcode					

Display Instructions Balloon: The red balloon in the upper right corner will highlight and display instructions on any fields still required on that page when you click on it. That balloon will not disappear until all required fields on that page are completed fully and accurately.

	+ Is the Primary Insured the policy owner?	
CONTINUE	+ Are there Child Riders? This is a Tris is a moured beld	
Page 1	Is the Preserve insured If Yes If Yes	Tyes 2 No

Tooltip Text: When you click into a field, a tooltip text will populate and aid in formatting instructions for that field.

Ple	ase enter numeric value.	All
Contraction of the second	S	
i ata l		

Screen Controls: You can use the following navigation tools to get to other sections of the application. You can jump through several pages filling in information as it becomes available.

You do not need to complete the form pages in sequential order.

• Click the previous and next blue boxes on the page to move through the pages of the application.

	1	denominant - Pai		- Javo	Sateris	
DATA ENTRY	2 316	MATURES	3 FINALIZ	E	0	CONTINUE
¥			Insured			9
Insured Perso	nal Informa	tion				
Prefix Fir	st Name	Middle Name	Last Name	Suffix	Date of Birth	Age
Gender Ide	ntification Type	Drive	r's License/Government Iss	ued Picture ID	State	
• [•				*
sured personal representative	e or legal guardian					
		*				
Home Address	3					
Home Address	3					
Home Address	3					
Home Address	\$					
Home Address	\$					
Home Address	•					
Home Address	\$]					
Home Address	s 					
Home Address	\$	Zipc	da			
Home Address Address Lookup: Enter an address Address Line 1 Address Line 2 Dity	State	Zipce	de			
Home Address Address Lookup: Enter an address Address Line 1 Address Line 2 Dity Years at Address	State		ide			
Home Address Address Lookup: Environ address Viddress Line 1 Viddress Line 2 Vity 'ears at Address U	State State se as Mailing Address'	· Zipci ?	ide Yes 🚫 No			
Home Address Address Lookup: Enter an address Uddress Line 1 Uddress Line 2 Sity 'ears at Address U	State State se as Mailing Address'	2 Zipco ?	ide Yes 🚫 No			

Click the Open down arrows in the top left corner to view all sections of the application. Sections with icon do not require any additional information to be entered. Sections with icon A still require information to be completed. You can jump to a section by clicking on it or you can click the Close arrows to close this list.



Percentage Complete Indicator: In the upper left corner, there is a percentage complete indicator. This will display the percentage of completed required data in the application to meet the minimum amount of information to get to complete status and be able to capture signatures.

If you click on the percentage indicator, you will get a list of required fields that remain to be completed. Click the X on the lower left corner to close the required fields list.

DATA ENTRY 2 SIGNATURES	3 FINALIZE
	Insured
APPLICATION: Electronic Signature and Delivery Disclosures Page 1 - This is a required field. (OFFICE USE ONLY)	Amoritar
APPLICATION: Electronic Signature and Delivery Disclosures Page 1 - This is a required field. (OFFICE USE ONLY)	Amentas
Producer Statement Page 1 - Field does not match Agency Number format.	h Age Gender
Producer Statement Page 1 - This is a required field.	cense v rg5645 State: OH v
APPLICATION: E Producer Statement Page 1 - Field does not match Agency Number format.	State Zipcode Years at Address Household Ne
APPLICATION: E Producer Statement Page 1 - This is a required field.	Purpose of Insurance: survivor needs
Owner Page 1 - This is a required field.	*
APPLICATION: E Financial Information Page 1 - This is a required field.	
Owner Page 1. This is a required field	

Application Navigation Bar Features:

Save: At any point you can click **Save** in the navigation bar to save any changes. If you do not have all the information you need to complete the pages, you can save your progress and then return to the application as often as necessary to complete the application. eApply stores your saved applications for up to 6 months. You can retrieve saved applications by clicking on **My Applications** on the Home Page.

• Other Actions: Use the other actions menu to perform additional tasks such as:

Other	Actions		
Summ	ary		
Displa	y/Print PDF		
Histor	À		
Docum	nents		
Reque	sts		
Manag	e Optional Fo	ms	
Reque	st Client to Fil	І Арр	
Show	Annotations		

- **Summary** – This pulls up a small window that shows the name of the application. You can rename the app in this screen by typing your changes in the Application Name Box and then clicking the save button in the right corner. This screen also displays other information pertaining to the application as seen below:

	Summary	(
Name:	Jane Smith - Term 30 Application	8
Status	Data Entry	
Carrier;	Ameritas	
Product:	Ameritas Value Plus Term	
Activity Type:	Application	
Jurisdiction:	Kentucky	
Policy Number:	6407AMA18051923849	
Errors On Forms:	Yes	
Created:	5/19/2018 10:28:36 AM	
Last Updated	5/19/2018 10:28:38 AM	

- **Display/Print PDF** – This task allows you to view, save and print selected documents from the application package.



- History – This task allows you to view the history of the application as shown below.

	History
Data Entry	Application 'Copy of Copy of Mary Smith - Term' was unlocked and the status changed from 'Locked' to 'Data Entry' by 'Ameritas Acent'
23/2018 1:03:53 PM EST	
ending Signatures	'Ameritas Agent' locked down application 'Copy of
ocked /18/2018 10:55:48 AM EST	application is now ready for signature and review processing.
ata Entry	Application was updated by 'Ameritas Agent'.
pdated 18/2018 10:55:46 AM EST	
ata Entry	Application was updated by 'Amentas Agent'.
pdated /18/2018 10:55:46 AM EST	
Data Entry	Confirmation Number '6407AMA18051823758' was
ack Office Message	assigned to the application by the Back Office provider.
/18/2018 10:52:24 AM EST	

- **Documents** – This task allows you to attach additional documents to the application from your computer. Here you can add things such as exams, illustrations, or any other documents you feel need to be attached.

I Document	
Select Document Type •	
Select Document Type ments must be in PDF format and no larger than	20 MB.
	Select Document Type ments must be in PDF format and no larger than

- **Requests** – This feature lists all the completed or outstanding requests for this application. Use the Requests feature to view any signature request or requests for the client to complete the application. In the Application Requests screen, click cancel to cancel and remove any pending requests.

		Requests	
Pending	Requested On: Request:	5/23/2018 4:13:53 PM EST Form Fill Request Sent to Client	
Cancel	Full Name: Email:	Jane Smith	

Request client to fill application

Use the **Request Client to Fill App** function to send an email to the client to request information to be completed.

- 1. On the navigation bar, select Other Actions and then click Request Client to Fill App.
- On the Left side of the email request screen, first select Signer Type and then fill in the Recipient Name, Recipient Email, Your Name (agent's name to display in the email that is sent to the client), Your Email (agent's email), Client Last 4 Digits of SSN, and Client Birth Date. (DOB and SSN are required here for client verification purposes).
- 3. Once all fields are completed, you can see the system-generated email on the right. You can click in this and make any changes to the **Subject** or **Message** fields if needed.
- 4. Click **Send Email Request**, and the system will automatically send an email to the client with a passcode for verification purposes, and a second email with the link to the application.

			and a second sec
Signer Type:	Select Signer Type •	Subject	Tabitha - Term test - Please complete filling your application
Recipient Name:			Dear (CLIENT_NAME).
Desisient Frent			Thank you for choosing to apply for life insurance, disability income insurance, or an annuity policy with Ameritas Life
Recipient Email:			Insurance Corp. or Ameritas Life Insurance Corp. of New York.
Your Name:	JPR		Ameritas® helps put worry behind and the future ahead by offering
Vour Email	inc@ushoo.com		help to enable a life that's rich in family, happiness, and financial
rour Email.	Ibi@yanoo.com		accurry.
ient Last 4 Digits of SN/Government ID:		Message	•
* Client Birth Date			
Cilent Dirth Date			
	Complete annotated areas only.		
* These ush	lisma of show in email.		

Client to fill app (client steps)

The client will receive two emails. The first email will provide a **PassCode** used to access the application. And the second email will provide a link to the application (see below example).



- 1. The client will select the blue underlined Link, and the application system will open in their internet browser.
- 2. They will be asked to enter the last 4 digits of their social security number and date of birth to access the application (must match what the agent entered on the email request page). Or, they can verify their identity by entering the **Passcode** provided in the first email sent to the client.

Welcome	
Last 4 Digits of SSN/Government ID: Birth Date (MM/DD/YYYY): Enter	3
Passcode	
Enter Questions and Support	

- 3. The client can now complete their information. They have the option to save what they enter and come back to the application later by selecting Complete/Log Off in the upright navigation bar.
- 4. They will then get a pop up window with the option to Submit and Logoff or Save Finish Later. While the client has the application, the application is locked and not able to be changed by the agency. Before the application can be unlocked for the agent to make additional changes or see what the client completed, the client must select Submit and logoff.

A	Complet	te Activity	و
	Submit and logoff	Save - Finish later	
If you sel If you selec	lect "Submit and logoff" you will not be a t "Save - Finish later" you will be able to	able to come back to make additional changes. come back to make additional changes.	

5. Once they submit and logoff, they will get a message saying their actions are complete and no further steps are needed. The agent will now be able to access the application once they login to eApply.

Pending request

Agents can view any pending request that has been sent to the client and send reminders.

• When a request is pending, the agent will receive a **Pending Request** notification window (below).



• The agent can use **Send Reminder to {client name}** to send an email reminder to the client that they have a pending request. The link to eApply will be in this email as well.

Request Type: Clie Recipient: asdf; Email Sent: a@f.co Date: 7/18/2018 10 Passcode: rX2Scu	mt Fill Application Insured m 23.18 PM q0	
From Name	JPR	
From Address	ipr@yahoo.com	
To Name	asdf	
To Address	a@f.com	
Subject	Tabitha - Term test - Please complete filling your application	
	Dear asdf, Thank you for choosing to apply for Ife insurance, disability income insurance, or an annuity policy with Ameritas Life insurance Corp. or Ameritas Life Insurance Corp. of New York.	Î
Message	Ameritas® helps put worry behind and the future ahead by offering best-in-class insurance, retirement and investment products that help to enable a life that's rich in family, happiness, and financial security. Before your application can be submitted for processing, some additional information is needed. Pease legin to https://staging.firelighteapp.com/L4Q and follow the on	

- You can also Send Passcode to {client name} Cell Phone or Send Passcode to {client name} Email. This creates a new passcode in case they cannot verify using their social and DOB and have misplaced the Passcode originally sent.
- You also have the option to **Cancel this Request**. When you click on this option, you will get a confirmation dialog asking if you are sure you want to cancel the request.

Unlock application

When a request has been sent to the client to complete the application or the signing process has been begun, the application is locked from being revised.

• The boxes will be grayed out when they are locked (see below).

₩				Insured			
Insure	d Pe	rsonal Inform	ation				
Prefix	٣	First Name jane	Middle Nar	e Last Name doe	Suffix	Date of Birth 01/01/1985	Age 35
Gender		Identification Type		Insured personal representative or	legal guardian		
Female	*	N/A	*	Not Applicable		*	

- While the application is **Locked**, you can unlock the application by going to **Other Actions** and selecting **Unlock Application**. This feature only shows in the other actions menu when the application is locked.
- When you select to unlock an application, you will get a warning message. Any signatures or information entered on the client's end will be lost and must start from the beginning of the process again.

Unlock Application	
Unlocking the application will allow the application to be revised. Unlocking the application will revoke all previously captured signatures and reviews for this application. All signatures and review processes will need to start from the beginning.	

Signatures

When an application reaches 100% complete, a pop up ask if you want to **enter more data** or **continue** to the next step.

×
*.

- 1. Clicking **Continue** will lock the application from any changes being made and move you to the signature process
- 2. Next, you will be asked if want to Use E-Signature or Decline E-Signature.
 - Declining means that you can have access to the PDF policy and can retrieve signatures by hand and then submit via SMS or Fax.



When using E-Signatures, the next screen will display a list of required signatures. You can obtain
the signatures in any order. The agent's signature can be done before or after all signatures are done.
Note: The application will be locked upon making the choice to use E-Signatures. If you need to unlock
the application for additional information, you will have to unlock the application (see page 22).

1 DATA ENTRY	4	2 SIGNATURES	3 FINALIZE
		List of Required Signer	5
	nsu 👔	ired : jane doe	
	🔒 Prod	ducer : agent	
		Completed Signatures	

- 4. You have two options:
 - Sign Now should be utilized when the client is physically with you and is ready to sign.
 - Send Email Request should be used when you want to send the request remotely via email.

1 FORM ENTRY	2 SIGNATURES	3 FINALIZE
	Client Signature Choice	
Pleas	e indicate below the method you would like to use to	obtain the client signature. nd Email Request
	© 2018 Insurance Technologies, LLC. Browse	er Requirements

When signing now

If your client is physically with you, you can use the Sign Now option.

1 FORM ENTRY	2 SIGNATURES	3 FINALIZE
	Client Signature Choice	
Pleas	e indicate below the method you would like to use to of	btain the client signature. d Email Request
	© 2018 Insurance Technologies, LLC. Browser	Requirements

1. When you click this, it will take you to the verification screen.

1 FORM ENTRY	2 SIGNATUR	ES	3 FINALIZE
	Agent Identifica	tion Verification	
	Agent ID: A	G00008564	
	Client Identifica	ition Verification	
	Form of Identification:	Drivers License	•
	ID Issue Jurisdiction	Virginia	
	ID Number	RG586465	
	Name:	Tabitha Sullivan	
L	ist 4 Digits of SSN/Government ID	0101	
	Birth Date.	01/01/1950	
	Email Address	tabitha.sullivan@am	eritas.co
	. A Marified	Cancel	
	V HILING	Canter	

Signing process

2. Once verified, the next screen will be a list of documents that will be need to be signed.



3. Before the system will allow the applicant to sign or initial a page, they must review ALL pages. If there are more than one page, you must arrow through all pages before the system will allow you to move forward.

1 FORM ENTRY	2 SIGNATURES	3 FINALIZE
	Insured Initial	
Before s	igning, <mark>you must review all pages</mark> of e Please click the buttons belov	ach of the 1 documents below. v to proceed.
+	APPLICATION: Customer Electronic Cor	nsent
Initials are required in th	is document set.	
		APPLICATION: Customer Electronic Consent Page 1.d
Amerita	as.	<u>>></u>
	Ameritas Life Insurance Co	orp.
	Ameritas Life Insurance Corp. of	New York

4. On each page, the client will need to review and then select the check box indicating that they have reviewed all pages.



5. You will notice the check box does not become available until all pages are reviewed when a document is more than one page long.



6. Once all pages are reviewed and checked off, you will get the option to move forward with signing.

7. There are two signature options. They can type their name:

1 FORM ENTRY 🥜	BIGNATUR	RE S	3 FINALIZE
	Capture Elect	tronic Signatur	
Signer Pull Name	Joe Smith	City	Cincinnati, OH
State	Virginia ·	Today's Date	4(16(2018
	Sign on this goal to	overlide the text o	origi
	Joe S	Smi	ith
V I Cons	ent 🔀 i Decline		Clear Signature

8. Or they can use a stylus signature on a tablet or touch screen:

	Agent On-Site	Signature		
Agent Full Name		Agent ID:	AMA0000	
City:		State	Virginia	.*
Today's Date: 4/16	1/2018			
	t 💥 i Decline	Cancel	Clear Signature	

Email signature request

• If the client is not present and would prefer to sign using a secure web site, click Send Email Request.



- 1. Next, enter information in the following form and click **Send Email Request**. In the email, the client is instructed to click the provided URL link, enter a passcode or the last 4 of their SSN and birth date to access and complete the e-signature process for the application.
 - a. You can also **Generate Link Without Email** and copy and paste the link into your own created email to the client.

	Your signer will receive an email m	essage with instru	ctions to complete the electronic application process.
Signer Name:	jane doe	Subject:	Copy of Copy of test ny - Please complete your signature
Signer Email:	jd@gmail.com		Dear (CLIENT_NAME), * Thank you for choosing Ameritas® for your insurance needs. Your
Your Name:	Agent		Ameritas® helps put worry behind and the future ahead by offering
Your Email:	prands@ameritas.com		help to enable a life that's rich in family, happiness, and financial accurity
Signer Last 4 Digits of SSN/Government ID:	1234	Message	To finalize the application process, please provide your electronic -
* Signer Birth Date:	01/01/1985	message.	

2. When you send the email request, the application will be locked, and a request window will display showing that request. From there you can send reminders to the client and cancel the signature request.

(Ins	ured	Page
* Is th subs First Ni mary Socia	Pending Request Request Type: Electronic Signature Insured Recipient: Jeff Jones: Email Sent: tabitha sullivan@ameritas.com Date: 7/21/2018 4:41:35 PM Passcode: 2qTkRpmA	Send Reminder to Jeff Jones Send Passcode to Jeff Jones's Cell Phone Send Passcode to Jeff Jones's Email Cancel this request	
123-4: Home /		[Close]	

Emailed signature request (client process)

The client will receive two emails. The first email will provide a **PassCode** used to access the application. And the second email will provide a link to the application (see below example).



- 1. The client will select the blue underlined Link, and the application system will open in their internet browser.
- 2. They will be asked to enter the last 4 of their social security number and date of birth to access the application (must match what the agent entered on the email request page). They can also verify their identity by entering the **Passcode** provided in the first email sent to the client.

Welcome	
Last 4 Digits of SSN/Government ID: Birth Date (MM/DD/YYYY)]
OR Passcode Enter	
Questions and Support	

3. Once they verify who they are, they will be taken to the following screen where they can **View Application** in a PDF format, **Sign Application**, or **Contact Agent** by sending a message to the agent's **Messages**.

	Electronic Signatures
Federal Regulations and Definitions	View Application
UNIFORM ELECTRONIC TRANSACTIONS ACT (UETA) Implementation of the Government Papenvork Elimination Act	Sign Application
	Contact Agent

4. Once they select Sign Application, they will follow the steps of the Signing Process (page 24).

Producer signature

Before the application can be finalized, the producer must sign. Click **Producer** under required signatures.



1. The producer will then be taken to the signing process. They can **Confirm all documents without reviewing individually** at the review process by checking the check box.

		Producer Signatur	•	
	Before signin	ng, you must review all pages o Please click the buttons be	f each of the 4 documents b low to proceed.	elow.
-		APPLICATION: Agreement Of	4	
		APPLICATION: Producer Statem	Hand	
		APPLICATION: HIV Consent Form	n CH	
	AP	PPLICATION: Electronic Signature and Deliv	very Disclosures	
1 have review	ed and agree with	the terms expressed within this document		
Confirm all d	cuments without	reviewing individually.		

2. Next the producer will select **Sign** and be taken to the signature screen.

IN ENTRY		3 FINALIZE
	Agent On-Site Signature	
Agent Full Name:	Agent I	AMA0000
Cay	Stat	Virginia *
Today's Date: 4/16/2018		

3. On the **Agent On-Site Electronic Signatures** page, enter the Agent information. **Agent Full Name** will get inserted into the signature pad. To override this, click in the signature block and simply sign on the pad. To clear the signature and use text script, click **Clear Signature**.

Once the signing process is complete and the producer selects **I Consent**, you will then be ready to **Finalize** the application.

Finalize and submit application

Once all signatures have been captured, you will be taken back to the application and a pop up will indicate that you have finished 2 of the 3 steps.

	2 sk	GNATURES	3	3 FINALIZE	
SOPEN		In	sured		Page 1
INSU * Is the agen	Finis	shed 2 of 3 Steps	. Pleas	e Continue.	s %
Subscriber/	MI. Last Name	Date of Birth	Age	Gender	_
mary	smith	01-02-1989	29	Female	
Social Security/T	ax ID No Identification	Driver's License/Go	vemmen	t Issued Picture	

- To submit the application to the new business team, you must first finalize the application.
 - 1. Click on **Continue** in the upper right-hand corner.
 - 2. The pop up message shown below will display.



3. Once you confirm you want to submit the application, you can select **Yes**. This will complete the application and no further action is needed.

OPEN			Insure	d			Page 1
IN	Applica	ation has be	en transm	itted success	sfully.		
* is th	To print or view the ap	Thank you	istory, or o	locuments, s	elect Other Act	ons.	
		TTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTT		and a real of a server Tak Tak I			
Fest Ni mary						[Close]	
First Ni mary Social	Driver's License	rg8888	,	State: OH	***	[Close]	J
First Ni mary Social 123-45-6788 Home Address	Driver's License City	rg8888	State	State: OH Zipcode	Years at Address	[Close]	J

Mobile offline access

The mobile offline capability feature allows you to save an application while you're online, then access it later when you don't have internet access.

Additional Information:

To take advantage of this feature, you will need to install the Firelight software. Firelight software is available for windows only – not Apple or MAC. Once installed, you can access the offline portal from your computer start menu – All Programs > Insurance Technologies folder > Firelight Console.



You must first start the application while online, then save it. You can then "check it out" to use in the offline mode. You can send the completed application to us electronically, using your normal process, once you return to an online environment.

The following information provides instructions to install Firelight, add multiple devices and reset passwords.

Installation Instructions

Follow these step-by-step instructions to install the Firelight Console to your device (tablet, laptop, etc.) and enable you to work on applications while you are disconnected from the Internet.

Login to eApply then click on "My Preferences."

- 1. Click or tap the Add New Device button to get an Access PIN.
- 2. Click or tap the **Send PIN** button.



3. Enter your **Name** and **Email** and click or tap the **OK** button to send the Access PIN to your email address.

	Email Key	
Name:	JSmith-FL	
Email:	johnsmith@insurancetechnologies.cc	
	6	
	OK Cancel	
	Cancer	

- 4. Click the Windows Install button.
- 5. In the notification bar at the bottom of the FireLight window, click **Run**.

Add New Device	4 App Store Windows Indet
New Device	
Access PIN expires 6/23/2016-8-85 PM Install FeeLight Conside and register using the	Achuatian Kay 1963/2363-60/1
mdavid	
Status: A Second Last Connected on: 10/21/2014 9/24 PM	White Device Revert Pachaerst

6. On the Security Warning dialog box, click the **Install** button.

Application Install - Security Warning		×
Do you want to install this application?		3
Name: FireLight Console (QE 28) 2.8.0.108		
From (Hover over the string below to see the full domain) firelight insurancetechnologies.com		
Publisher: Insurance Technologies LLC	+	
	Install	One't Install

7. Enter the Access PIN (sent to your email) and the Device Name (name you would like to use for your tablet, laptop, etc.) and click the Continue button.

Enter your Access PI	N and Device Name.
Access PIN	1903-7353-6071
Device Name	ismith-FU

8. Enter an **8-digit** Password (must include at least 1 number, 1 symbol and 1 uppercase), re-enter the Password, and click the **Login** button to start the Console.

NOTE: The Password is required to log on to Firelight.

Firel	Light
Please enter a 4 digit numeric p	assword to use for authentication.
Device Name:	jsmith-FL
PASSWORD	
RE-ENTER PASSWORD	
Lo	ain 🖕

- a. If an Invalid Password dialog box appears, click OK to close the dialog box and then enter a valid
- b. Password, re-enter the Password and click the Login button.



c. FireLight starts and displays your active applications in the On Server section of the Console.



When ready to exit Firelight, click the menu button on the upper left and click Exit.

NOTE: In FireLight, the Mobile Access section displays the status and provides a button to enable you to reset your password.

Add New Device	Download on the App Store Windows Install
jsmith-FL	

Reset password

If you forget your Firelight Password or the Password expires, you can initiate a Reset Password from FireLight.

1. Click the **Reset Password** button.

Add New Device	App Store Windows Install
ndavîd	

2. Click **OK** on the Password Reset dialog box.

assword Reset
a Password Reset for this device?
K Cancel

- 3. You will need to reset your Password the next time you log on.
- 4. The next time you log on, the following message will display:

Yo	Password Reset
The	Your password has been reset from the server. You must enter a new password.
	Click OK to reset your password.
Ļ	
	1

5. You will be prompted to provide the following:

lour partward has been reset	
Please enter a 8 character password	4
The parenter a 8 character password	a.
the password must have at least 1	numbers, 1 symbols and 1 uppercase.
Device Name:	VL
PASSWORD	
DE ENTER DACEWORD	1
RE-ENTER PASSWORD	1

RedTail

RedTail is a web-based CRM database that can be used with eApply. If you have a subscription with RedTail, you will need to have your username and password saved under Preference.

RM	Redtail	*	User Name	eApply_Redtail	Password	
1				11/2		

1. On the case cover page, click "Lookup Insured in Redtail CRM."

×	Case Cover	
Insured Informa	tion	
LOOKUP INSURED IN RED	DTAIL CRM	

2. On any page requiring client information, the RedTail button will be in the upper right corner. You can click this link on any page requiring client info (Insured, Primary Beneficiary, Owner, etc..) and a search box window will populate.

My Contacts	Name, SSN	ABCDEFGHIJKLMNOPQRSTUVWXYZ
		Select

3. Once you find your client, you can click on their name, and all their information that you have for them, that is formatted correctly, will be pulled into the application.



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