

Quility SBLI Life Applications Portal - Frequently Asked Questions

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How Do I Start an Application?

Start a new application directly from the Home page by selecting the Quick Quote button on the product selection tile. If the product selection tile is grey this indicates that the product is unavailable, and you cannot launch an application. A product may display as unavailable because it is yet to be launched or you may not be contracted or appointed to sell the product.

You can also start an application from the Application Management screen by selecting the New Application button. Be sure that you select the desired product in the Product dropdown menu at the top before launching the application.

What is Application Management?

Application Management provides access and organization for in-progress and completed Quility Level Term applications. It provides new functionality such as allowing you to easily resume an application as well as have a record of previous applications and the respective status.

What Applications Can Be Viewed on Application Management?

At present Quility Level Term (ROP* and non-ROP) applications and policies can be viewed and accessed via Application Management. As more products are added to the portfolio, you can filter which product is displayed by selecting from the Product dropdown.

*ROP = denotes Return of Premium, a product sold prior to 3/14/24

What Time Frame is Available on Application Management?

The viewer can select the following time period from the dropdown menu:

W = to display all records for the last seven days, ending the evening before

M = to display all records for the last 30 days, ending the evening before

Q = to display all records for the last 90 days, ending the evening before.

Y = to display all records for the last 365 days, ending the evening before

What Do the Tiles Across the Top of the Screen Show?

The workflow tiles across the top of the screen display the relevant number of items for the time period selected. These can be viewed as a waterfall, moving from left to right through the application process. You could use this information to determine if there are any roadblocks or areas for improvement.

- Quotes: number of quotes completed.
- Applications: number of applications initiated.
- Identity Verified: number of applicants which passed identity verification.
- Underwriting Questions Submitted: number of applicants who completed the application questions.
- Consent: number of applicants who provided consent.
- Approved: number of applicants who were approved.
- Policy Submitted: number of applicants who signed their application.
- Not Paid: number of applicants who did not pay for their policy.
- Policy Issued: number of applicants who were issued a policy.

How Can I Search for an Application?

Enter the ARCID or policy number in the 'Search for an application' box to easily search and display the desired result. If the record does not exist, the table below will be blank. Check your entry for accuracy or contact the [Afficiency Customer Support Team](#) for assistance.

How Can I Search for a Particular Application by Status?

Select the desired status from the Application Status dropdown box to display only applicable records in the table below. Applications can be filtered by: All, Completed, In Progress, and Not Started.

How Can I Search for an Application by Afficiency Customer Support Ticket Status?

You can display records by the desired Afficiency Customer Support Ticket Status by selecting the status from the Ticket Status dropdown box. Status includes:

- All
- Open: Ticket has been logged, awaiting a response from Afficiency Customer Support. Ticket can also show open if the agent or anyone outside of Afficiency has sent an email on the ticket whether new or in progress.
- In Progress: Afficiency Customer Support are actively investigating the issue.
- Closed: Issue has been resolved.

How Can I Remove All Filters Applied to my Application Management View?

All filters can be removed by selecting the 'Clear all Filters' button. Try this first if you are having troubles finding a particular application.

What Information is Displayed in the Application Management Table?

The following information is displayed in the table:

- ARCID: Unique identifier for each application
- Date: Date application started
- Product: Name of the product on the application
- Details: Coded summary of the application details. Including applicant state, gender, and age.
- Status: Includes Submitted, Policy in force, Policy lapsed, D/O before pay info, D/O before UW submission, Not taken, Not taken: free look, UW decline: 3rd party, UW decline: app questions, ID check fail, MIB pending
- App Status: Includes Completed, In Progress, Not Started/Quote Only, and Submitted
- Term: Displays the length of the term
- Coverage: Displays face value / coverage
- Premium: Displays the premium amount
- Policy#: Displays the policy number if application complete and policy issued.
- Ticket Status: Status of Afficiency Customer Support ticket
- Actions: Additional dynamic actions available including:
 - Continue Application: Resume incomplete applications from last point in the journey for applications where underwriting occurred less than 21 days ago.
 - View Application Details: View PDF of application if complete. [Coming soon]
 - View U/W Report: View the Underwriting Report, only available for declined applications. [Coming soon]
 - Open a customer support ticket: Directly links to the Afficiency Customer Support team.

How Do I Continue an Application in Progress?

To continue an application, use the filter/sort options to find the application in the list below. You can also enter the ARC ID in the search box to quickly narrow the list. From there, find the "Actions" column on the far-right side and click on the 3 vertical dots to open the menu and select "Continue Application." You can only continue applications that show "In Progress" in the App Status field that are 21 days or less from the date of underwriting.

Can I Download the Sold Policy From this Portal?

For copies of sold policies, continue to use SBLIAgent.com.

Can I Access my Commission Information from this Portal?

Please refer to SBLIAgent.com for all agent commission information.

Why is My Application Not Appearing in the Listing at the Bottom?

All applications that have been initiated will appear, within the hour, in the bottom section of the Applications Management page. Contact the Afficiency Customer Support Team for assistance if an application does not display after an hour has elapsed.

How will an Application Appear where Split Commissions are involved?

The application will display only for the agent designated as the writing agent on the policy.

Why Can't I Click the Quotes Tile to Display All Quoted Applications?

Clicking the summary tiles at the top of the Application Management page filter the applications displayed at the bottom. However, the functionality to display every quote is not available; only applications can be displayed.