

Medicare Supplement Enhancement to e-app



06/06/2012

Marketing

Effective June 9, 2012 on your Med Supp e-App Dashboard you will be able to view any tasks noted by Mutual of Omaha related to your submitted applications without having to go to the Health Case Status report.

A new column has been added to the Dashboard labeled Open Task Date. The Open Task Date column displays a date only when there is an open task or tasks associated with a submitted e- App application. This includes: applications that have been signed by the applicant and where the App Status column shows either Submitted e-Signature or Submitted Voice Signature. *Applications signed by wet signature are not included.*

To see if you have any open tasks, click on the column header to sort. All applications with open task dates are displayed first on the dashboard in chronological order.

Start a New Quote or Application Initial Documents

Search for an existing quote or application.

First Name Last Name Policy Number Phone Number State

App Status Last Modified Producer Filter

-- Select -- -- Select -- Only myself

Search Reset

Applicant Name	Policy Number	Phone Number	State	Start Date	App Status	Last Modified	Open Task Date
VOICESIGNTESTMAY, DONNA	916487-90	(111) 111-1111	NE	05/16/2012	Submitted Voice Signature	05/16/2012	05/16/2012
TNPRODWETSIGN, CRAIG		(402) 111-1111	TN	03/06/2012	Submitted Wet Signature	03/06/2012	
TNPRODWETSIGNA, CRAIG		(402) 111-1111	TN	03/06/2012	Submitted Wet Signature	03/06/2012	
TNPRODSIGN, CRAIG	906948-90	(402) 111-1111	TN	03/06/2012	Submitted e-Signature	03/06/2012	

To view a task, click on the applicant's name and then click on the "Notes" button located on the pop-up dialogue box. Any task(s) associated with this application will appear. (See sample below) The view will display either the word 'System' or an individual's name in the Created By and Owned By columns. In addition, the view displays a date created, an end date and an action required date. The end date is populated when a task has been closed out by Mutual at which time the status will display as 'Closed'. If there are multiple tasks associated with an application, once ALL tasks for that application have been closed, the Dashboard will now longer display a date in the Open Task Date column and the tasks will no longer be viewable.

Medicare Supplement e-Application

Tasks

Close Refresh

Description	Status	Created By	Owned By	Start Date	End Date	Action Required Date
Other Requirement	Closed	Lucas, Donna	Lucas, Donna	05/18/2012	05/18/2012	05/18/2012
Producer/Agent Appointment and Licensing Verification	Open	SYSTEM,	SYSTEM,	05/16/2012		06/15/2012

5 per page 1-2 of 2

For your own records you may add a note to the selected task. Click on the task and a pop up window will display (*See sample below*) in which you can type notes associated with the task. When finished, click the "Add Note" button. All notes will display with the newest date & time from top to bottom. To exit this window, click the 'X' in the upper right hand corner. This will return you to the task window. To exit the task window and return to Dashboard, click Close.

The screenshot shows a pop-up window titled "VOICESIGNTESTMAY, DONNA" with a close button (X) in the top right corner. The window contains the following fields and elements:

- Created By Id:** A text input field containing "id0415788".
- Created By First Name:** A text input field containing "DENNIS".
- Created By Last Name:** A text input field containing "DICE".
- Note:** A rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent Left, Indent Right, Undo, and Redo. Below the toolbar is a large empty text area for typing the note.
- Add Note:** An orange button located below the text area.
- A scrollable container below the "Add Note" button, which is currently empty.

If you have questions, please call Sales Support at 800-693-6083.