




Helpful tips

North American Company for Life and Health Insurance®

- 1 **Accessing SimpleSubmit®** – Log on to northamericancompany.com and click  SimpleSubmit eApp
- 2 **Pre-qualification screen** – Make sure to completely read the pre-qualifications before completing the electronic application with your client. This will help avoid starting an application that is not supported by SimpleSubmit.
- 3 **Pop-up blockers** – Be sure to shut off pop-up blockers before starting the electronic application to allow for smoother completion.
- 4 **Binding coverage** – Applying for a temporary insurance agreement requires payment via electronic funds transfer (EFT). You will need to enter your client's banking information.
- 5 **Client's email address** – Providing your client's email address is necessary for them to receive:
 - All required disclosures and forms with no action needed from you
 - A copy of the signed application packet once all signatures are collected
 - The "Next Steps" flyer
- 6 **Convenient online paramed scheduling** – If required, the online scheduling tool allows for appointment requests to be made conveniently online! APPS and ExamOne are two great vendors available at this time. The online scheduling tool is directly linked to the paramed company you choose and will function differently, depending on which company is chosen.

Prompts on the screen will walk you through the scheduling and confirmation process. You can opt to bypass the online scheduling tool and schedule the exam with an approved vendor of your choice. Traditional underwriting in SimpleSubmit must have the medical questions completed by the paramedical examiner. Paramed status information will update on your Pending Business Report. Remember, if the case is unlocked for any reason, the paramed order is cancelled and must be rescheduled.

- 7 **Signing flexibility** – Wrap up your sale with a face-to-face e-signature (either click-to-sign or finger signature on tablet). If it's not a face-to-face sale, then you may choose email e-sign.

Please Note: If the email e-signature option is selected, the application will not be submitted until all signatures (your client's and yours) are completed. This means the case status will not be available on your Pending Business Report until the signature process has been completed. This takes approximately 24 - 48 hours.
- 8 **Policy number** – Once the application has been locked, a policy number will be provided on the screen above the lock button.
- 9 **Policy Change**
 - Internal Exchanges are available by selecting Internal Exchange on beginning screen
 - WriteAway and Online Part 2 are not currently available
 - All replacement documentation will need to be provided
 - Temporary Insurance Agreement (TIA) does not apply
- 10 **Selecting Purpose of Coverage** – Select "Business" if the case is for Executive Benefits, Business Preservation, or Business Transition. Select "Estate Preservation" for cases using one of these designs: Irrevocable Life Insurance Trust, Spousal Lifetime Access Trust, or Charitable Planning - Charitable Remainder Annuity Trust. Additional options are for income replacement, personal, or other.

For technical problems related to SimpleSubmit,

please contact iPipeline at **800-641-6557** or email **support@ipipeline.com**.

Indexed Universal Life insurance products are not an investment in the "market" or in the applicable index and are subject to all policy fees and charges normally associated with most universal life insurance.

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