



## SimpleSubmit<sup>SM</sup>

### Helpful Tips

- 1. Accessing the e-App** – The only way to access SimpleSubmit is through your marketing organization's website. Please contact them for availability. The SimpleSubmit electronic application is NOT available on the North American Company website.
- 2. Product Availability** – Currently the SimpleSubmit electronic application is only available on ADDvantage<sup>®</sup> term (10, 15, 20, and 30) and Custom Guarantee<sup>®</sup> universal life insurance. All other North American products require a paper application.
- 3. Pre-Qualification Screen** – Make sure you completely read the pre-qualifications before you complete the electronic application with your client. This will help you avoid starting an application that is not accommodated by SimpleSubmit.
- 4. Pop-Up Blockers** – Be sure to shut off pop-up blockers before starting the electronic application to allow for smoother completion.
- 5. Binding Coverage** – Applying for a Temporary Insurance Agreement requires payment via Electronic Funds Transfer (EFT) or credit card.
- 6. Payment Schedules** – EFT and credit card payments are available on a monthly, quarterly, or semi-annual basis. Direct billing is available quarterly, semi-annually, and annually.
- 7. Client's Email Address** – Providing your client's email address is important because:
  - All required disclosures and forms are emailed to your client with no action needed from you.
  - A copy of the signed application packet will be emailed to your client once all signatures are collected (applies to electronic signatures only).
  - Your client will also be emailed a "Next Steps" flyer, which includes instructions for their paramed exam.
- 8. Convenient Online Paramed Scheduling** – Online paramed scheduling saves time. If possible, select a green appointment, which means the time is confirmed (yellow appointments are pre-set and could be subject to change). If the client cannot commit to a time, click on *Cancel Scheduling* and APPS-Portamedic will call your client to schedule. Paramed status information will update on your pending case information. With SimpleSubmit, online scheduling with APPS-Portamedic is the only method allowed.
- 9. 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 an email e-sign, or choose to sign at the paramed exam. *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 online until the signature process has been completed.
- 10. Policy Number** – Look for the policy number once you lock the app (the screen refreshes and the policy number appears—it will start with "LB09").

ADDvantage plans are issued on policy form series LS174 and Custom Guarantee is issued on policy form series LS170 or state variations by North American Company for Life and Health Insurance, Administrative Office, Sioux Falls, SD 57193. Product, features, riders, endorsements or issue ages may not be available in all jurisdictions. Limitations and restrictions may apply.