

MutualCare[®] Solutions e-App

Frequently Asked Questions

Backgrounds & Benefits

Q. What is the e-app?

A. It's an electronic application for long-term care that's designed to improve valid application efficiencies. You complete the e-app in person or on the phone. It's not approved for applicants to complete themselves.

Q. What are the benefits of the e-app?

A. Using the e-app will:

- Allow you to complete an application "in good order"
- Ensure you're using the right forms
- Offer the ability to view and/or print state filed forms at any time
- Reduce application scrubbing time
- Allow you to choose your method of signature collection – e-signature email, e-signature face-to-face or wet signature
- Provides a paperless, "green" experience

Getting Started

Q. How do I access the e-app?

A. You'll find an electronic applications link on Sales Professional Access under sales tools on the home page, the sales and marketing tab or at the bottom of each product page that use e-app technology.

Q. What is the e-app sandbox?

A. The sandbox allows you to get familiar with the e-app functions in a non-production environment. The sandbox will not allow you to submit an application to Mutual of Omaha for review.

Q. Is Internet service required to use the e-app?

A. Yes. The e-app is a web-based system. You need an Internet connection to log in to Sales Professional Access and complete the application. This provides you with a safe, secure platform for your client's personal information.

Payment

Q. How do I submit premium payments?

A. Please review to the "Completing the Application" section in your MutualCare[®] Solutions Product Guide.

Q. Do you support credit card payments?

A. Not at this time.

Completing the App

Q. Can I choose the order in which to complete the application?

A. Yes. You may navigate to another section of the app at any time by selecting the section you wish to work on. However, you cannot submit the app unless all sections are complete.

Q. Will the e-app edit any mistakes I enter?

A. No. The e-app does not edit for validity of information such as entering the incorrect date of birth or incorrect email address. The e-app does check for completeness of the application and will alert you if a section is not completed before you proceed.

Q. Can I save my information?

A. Yes. The e-app is designed to automatically save the information you have entered. If you have not completed the app, the status will appear as "incomplete." You can access the app at a later time through your dashboard. Click the View button for information, then click the Edit button to reopen the app and resume working.

Q. Is there a character limit to supplemental health information?

A. Yes. The application is limited to one overflow page. If supplemental health information is significant, please attach a file. Please attach file using Attachment: Choose File button.

Q. How can I quickly get to the sections of the e-app that are incomplete?

A. You can quickly maneuver through sections by clicking on them from the table located on the left of the screen. Incomplete sections will be highlighted.



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e-Signatures

Q. What is e-signature?

A. An e-signature allows both you and the applicant to review, sign and electronically submit an application via the Internet. To take advantage of the e-signature email option, an email address must be collected from the applicant and the applicant must have access to the Internet. Note: The producer's email address is not acceptable.

Q. What is a wet signature?

A. The wet signature option allows you to complete the application online, print the completed application and have your client physically sign it. This is the same process that is used to submit applications outside of the e-app process. Note: If the wet signature process is used, both the applicant and producer must use the same signature process.

Q. After the app is signed, can I change any information on the e-app?

A. Yes, unless the e-app has already been submitted. However, once you have applicant signatures and you want to edit the application, you will be required to obtain new signatures. A warning message will display.

Q. Can I print a copy of the app?

A. Yes. You can print the e-app by clicking the View button to view the app as a PDF file and print accordingly.

Q. How long will incomplete apps appear on my dashboard?

A. Incomplete apps will remain in the system for 30 days.

Communications

Q. How will I know the e-app has been sent to Mutual of Omaha?

A. If the app is submitted through the back office, an email will be sent to them letting them know an app has been submitted for review. Once submitted, the dashboard will reflect a Submitted status.

Q. What is a dashboard?

A. The dashboard will provide you a complete list of your applications and their current status. You can access your dashboard by clicking on the View Applications button once you sign into the e-app platform.

Q. Who should I contact for questions about the e-app?

A. For functionality or technical issues, contact the Field Assistance Center at (800) 847-9785. For usability questions, contact sales.support@mutualofomaha.com.

Back Office Staff

Q. Will I be notified when a producer submits an application for review?

A. Yes. You will receive an email similar to the example below:

From: Test Agent <swatson@psginc.co>
To: Ultra Agency john.smith@mutualofomaha.com
Date: 04/072015 08:22 AM
Subject: Application Submitted for Review

An application has been submitted for review. Please log in to the e-App to access it.

Agent: Test Agent (0123456)
Client: John Smith

Q. Can an application be sent back to a producer to provide correct information?

A. Yes. When reviewing the application, you can return it to the producer via email and indicate what information is needed.

Q. What happens if a producer selects the wrong commission code?

A. The commission code determines where the app is sent for review, so it's best to clearly communicate the correct code to your producers. If an incorrect commission code is selected, the app will go to that back office, if it is set up. Or it will be sent directly to Mutual of Omaha. The code can be changed by Mutual of Omaha once we are notified.

Q. Will I have access to all downline electronic applications?

A. Yes. However, only the applications you see highlighted in yellow have actually been submitted for processing.

Q. Does the producer receive confirmation when an application is submitted?

A. If an application is submitted through the back office, the dashboard will reflect a Submitted status.

Q. Can a producer submit an application to the back office prior to obtaining signatures?

A. Yes. However, the only option you will have following review is to return the application to the producer.