



MUTUAL OF OMAHA INSURANCE COMPANY

MED SUPP SALES SOFTWARE

HELPFUL HINTS

Contacts:

1. Regarding basic generic questions: 1-(800)-693-6083
2. Technical problems-receiving error messages. 1-800-847-9785
3. Status of an application, withdraw/cancel an application and ACH questions. See below.

Has application been completed?

Before Mutual of Omaha can receive an application, the entire e-signature process must be completed. The App Status column **must state** “ **Submitted E-Sig**”. (See screen below) If the column indicates “E-signature” the client still needs to complete the process.

In order for the application to be submitted, the applicant **MUST** type their name and date **EXACTLY** how it's presented. Upon clicking the “SUBMIT” button, the applicant should receive a screen that shows the following statement: “Please Wait While We Process Your Request”. If they do not receive this message, there is an error and they need to review the screen to correct the problem and click the “SUBMIT” button again. Upon successful submission, the applicant will receive a confirmation web page and email that thanks them for the business.

CLIENT REFERENCE SCREEN Agent ID: 381
Agent Name:
[Lookup Custo](#)
[Generate Init](#)

New Application

Search By:

Applicant Name:

ID Number: Phone Numbers:

Lead Source: Applicant Status:

Start Date: End Date:

SEARCH

Search Results (click on column title to sort results by that column):

Applicant Name	ID Number	Email Address	Lead Source	Phone	State	Agent Name	Agency	Lead Date	App Status
Lorraine Test	99012601	lorraine.thiele@mutualofomaha.com	Web Lead	1231231234	WI	Dan Producer	Dan Producer Agency	6/26/2009 2:25:43 PM	Submitted E-Sig
Lorraine Test	99012620	lorraine.thiele@mutualofomaha.com	Web Lead	1231231234	NE	Dan Producer	Dan Producer Agency	6/29/2009 10:48:23 AM	Submitted E-Sig

Application is completed, how do I view?

If the application has been completed, you may verify receipt of your application into Mutual of Omaha by checking Case Status Reports-Health Business located on SPA (Sales Professional Access @ mutuaofomaha.com/broker).



You **can not** view status of your application or receipt via Med Supp App Tracking Reports located on SPA, for this report will only show those applications that were faxed or mailed with the App Tracking form filled out and submitted. This does not apply to applications sent via e-signature.

Completed e-signature application will be “picked up” electronically daily at 5:30 pm. The policy should appear on Case Status Reports-Health Business the following afternoon, after 1:00 pm CST.

If your application was completed after 5:30 pm, it will be “picked up” electronically the following day at 5:30 pm, to be viewable on Case Status Reports-Health Business the 2nd business day afternoon, after 1:00 pm CST.

I need to withdrawal/cancel a completed/submitted application.

If you want to cancel/withdrawal an application that has been submitted via e-signature, please contact Underwriting at 1-800-995-9324 option 6. In order to assist, please obtain the policy number on Case Status Reports-Health Business (please refer above on when that policy will be received and displayed on the report).

I need assistance regarding payment process.

- a. *During payment entry:* Technical problems during the application process in which error messages are being received, contact the Field Assistance Center at 1-800-847-9785.
- b. *After application submitted:* If the application has been submitted and payment needs corrected, contact Underwriting at 1-800-995-9324 option 6. In order to assist, please obtain the policy number on Case Status Reports-Health Business (please refer above on when that policy will be received and displayed on the report).