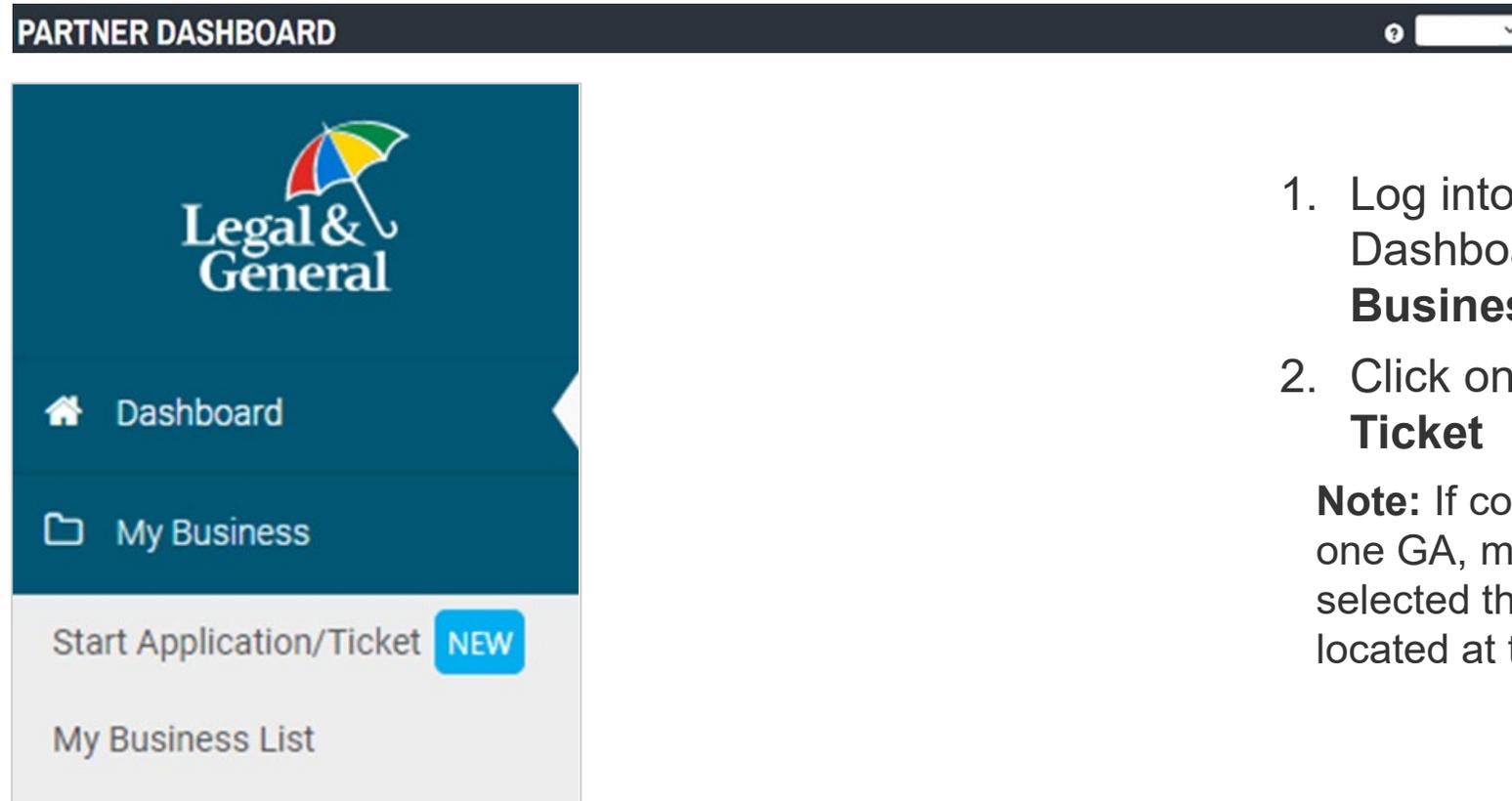# Drop a ticket from Partner Dashboard

Last updated November 2022

Drop a ticket from Partner Dashboard

1. Log into the Partner Dashboard and click on **My Business**

2. Click on **Start Application / Ticket**

   Note: If contracted with more than one GA, make sure you have selected the correct advisor code located at the top of the screen

3. Landing page

a. When using the GA link, you will land on this page

b. Select **Next**

4. Advisor Information

a. Please review the GA name at top to ensure this is the correct agency the business is to be submitted through

b. If needed, enter your advisor code; if you do not know your code, enter your national producer number (NPN) and last four of your social security number or TIN, depending on how you are licensed

c. If not contracted with this GA check the **I am not contracted** box; enter NPN and last 4 of SSN or TIN

d. Select **Next**

Note: If you do not remember your NPN click on **Lookup your NPN**

5. Client Information

   a. Complete all fields

   b. Select **Next**

   New: We now have the ability to Save Age; If your client wants to save age click **Yes** in the bottom left corner

   Pro Tip

   The state of sale is based on where the owner resides; please make sure you are licensed in that state.

6. Policy Information

   a. Complete the appropriate fields

   b. Select **Next**

Pro Tip

If the client is applying for more than one policy click +Add Policy located in the bottom left corner.

This will allow you to enter the policy information for each policy needed (up to 3 total).

When completing the applications the client will only need to repeat the Your Policy details.

If multiple policies are needed, enter the policy information for next policy (can apply for up to 3)

When completing the applications, the client will only need to repeat the 'Your Policy' details

7. Advisor Attestation

   a. Click **I Agree** to the terms and conditions

Note: Application reference number and policy number(s) will appear in the bottom right corner

There is one Application Reference number and will link all associated applications

Policy number will be unique for each policy applied for

8. To Drop a ticket click on **Send To Client or Schedule Interview** button

Note: This will allow the client to complete the application themselves online or complete the application over the phone with our call center staff

Select Application Method ✕

You have two options when dropping a ticket. You can either schedule an interview with one of our AppAssist agents or you can send the digital application to your client via an email link.

➤ Send to Client
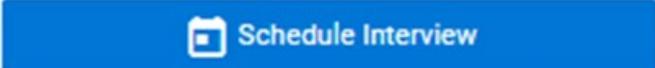
📅 Schedule Interview

Cancel

9. Drop a ticket: 2 options

- Send the digital application to your client via an email link or

- Schedule a phone interview with one of our call center staff

10. Send link to client via email

   a. Click **Send to Client**

   b. Receive confirmation that the email has been sent

Drop a ticket from Partner Dashboard

11. Schedule a phone interview

   a. You can schedule a phone interview by selecting a day and time and click on the **Schedule** button

From: "Banner Life | Legal & General America"

To:

Date: 02/03/22 04:09 PM

Subject: Complete your life insurance application

Bcc:

Application ID:

Hi

Thanks for choosing Legal & General America for your life insurance needs. We need to collect more information about you as the next step in securing your policy.

Complete Application

Helpful information to gather before you begin:

• Your driver's license

• Your Social Security Number

• Existing life insurance policies

• Health insurance coverage

• Details about your beneficiaries including date of birth, social security number and/or tax ID number

• Details about your health history which may include information about your doctors

If you would like to complete your life insurance application over the phone, schedule a time now.

Thank you,

Customer Support

Banner Life Insurance Company | A Legal & General America Company
1-855-914-9115
9:00am to 10:00pm EST, Monday-Friday

OnlineApp@lgamerica.com

12. An email will be sent to your client

   a. Sent from:
      'Banner Life | Legal & General America'

   b. Subject line: Complete your life insurance application

   c. If a phone interview has been scheduled the date and time will be included

   d. The client can schedule an interview if not already scheduled, they can also reschedule if previously scheduled by clicking on the "schedule a time now" link in the email

Click here to view flyer

13. Share 'What to Expect' flyer with your client

a. This flyer explains the application process. It includes what helpful documents to have on hand and exam prep tips (in case they need an exam.)

Thank you for your business.