Final Expense
MyEnroller Quick Start Guide

GWIC® GREAT WESTERN INSURANCE COMPANY

MyEnrollerˢᴹ, our electronic quoting and application tool, is available via internet connection for desktops, laptops, cell phones, or tablets. While in the field, connect to the internet via Wi-Fi or a mobile hot spot. MyEnroller uses one app for three Final Expense products and utilizes advanced technology to speed up the underwriting process and accepts three signature options. All of which add up to better agent and client experiences.

1. **Log in**
   a. If you haven't registered on GWIC's agent portal, visit my.gwic.com to create a username and password. Once you're logged in, click the "MyEnroller: Final Expense" button on the homepage.

2. **Dashboard**
   a. View details on Incomplete or Complete submissions or use the search feature to find a client's application.
   b. Begin the quote or enrollment process by adding key data.

Dashboard

Navigation

3. Navigating the site

a. "Jump-to-navigation" lets you toggle between screens you've visited. Click on the three horizontal marks in the top left corner to select past screens. You're not allowed to jump forward.

b. "Save and return" allows you to save the quote or application on the last page that you completed and takes you back to the Dashboard.

c. "Return to quote" allows you to return directly to the quote page to change options.

d. The "Progress bar" is located at the top of the screen. Click on any screen that has already been visited to make changes.

4. Quote screen

a. Select the state where you, as the agent, are appointed and will be completing the enrollment.

b. Insert the insured's ZIP code, gender, and date of birth and click on "Start new" to view the quote screen.

c. To make a correction or create multiple quotes on one screen, update the details and click "Refresh".

d. To begin enrollment, check the box to the left of "Final Expense", click the "Add plan" button at the bottom of the product section, and select the "Continue application" button in the summary on the right side of the screen.

5. Enrollment screens

a. Required fields are noted with red asterisks.

b. If any fields contain errors or missing information, they will appear with red text describing the issue or have a red box around them. You will not be allowed to move to the next screen until the errors are fixed or missing fields are completed.

c. Screens will contain information based on each state's filed forms and previously answered questions. Questions or text may expand on screens based on responses.

d. As you select and save features, you'll see them added to the summary box on the right side of the screen.

6. Signatures

    a. Users have three signature options.

        i. Electronic, which may be used when the applicant is present or not present.

        ii. Voice authorization through a conference call to an 800 number.

    b. If the owner is different than the insured, a signature for the owner must also be collected. The text on the screen will indicate when to collect each signature.

7. Additional functionality

    a. Split commissions

        i. To split a commission with another agent, enter the agent's name and GWIC Final Expense writing number, and the commission percentages that equal 100%.

    b. Email copy of application

        i. Forms can be sent to the applicant's email address for review and to save in their files. The copy will be a PDF and require a password.

8. Underwriting response

    a. The application is moved to the underwriting system for processing. You will see a decision on the app based on the client's information: it's accepted, an alternative plan is suggested, or it requires further review.

MyEnroller 💼

Thank you for your business. Based on your client's health history, we are able to offer the Guaranteed Assurance plan. You will see a side-by-side comparison below of the original plan you applied for next to the updated plan.

Case #132-0002-004657

Initial options quoted and applied for:
Plan Name: Great Assurance Final Expense
Rate Class: Non-Smoker
Face Amount: $4,000.00
Total Premium: $27.27

Eligible option:
Plan Name: Guaranteed Assurance
Rate Class: Smoker
Face Amount: $4,000.00
Total Premium: $45.58

Please press the "Accept offer" or "Decline offer" button to indicate your client's decision. If no response is provided, the agent will receive an email within 1 business day to accept or decline the offer. If no response is received within 5 business days, the application will be withdrawn.

If the offer is accepted, a policy number will be provided momentarily.

[Accept offer] [Decline offer]

Underwriting response: Alternative plan suggested