

# Product & Service Notice



Date: Sept. 17, 2021  
To: Ameritas Field Associates

Form Number: PS4317  
Product Area: Individual/Independent  
(excluding FLX Term and FLX IUL)

RE: Reminder/updates to field administration processes

**Summary:** Effective Oct. 1, 2021, we are introducing changes to:

- the licensing/appointment process when submitting new business and service applications, increases and term conversions,
- state-required and product-specific continuing education (including Regulation 187), and
- agent of record changes.

## REMINDERS

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In preparation of streamlining our processes, below are reminders on Just-In-Time Appointments and NY Reg 187 suitability and product training requirements from previous Product & Service Notices. (PS4261)

- **October 2020, Just-In-Time Appointments were introduced ([PS4261](#)):**
  - To help streamline the licensing process, if a field associate is not appointed in a state where new business has been submitted, Ameritas pays the appointment fee utilizing a Just-in-Time Appointment process.
  - Because Pennsylvania is a pre-appointment state, the appointment must be processed prior to sending in an application.
  - Field associates need to be licensed at the time of obtaining the application.
- **NY Reg 187 suitability and product training requirements reminder ([PS4249](#)):**
  - Effective May 22, 2020, Ameritas **only** will accept courses provided through RegEd to meet the suitability and product training.

## NEW PROCESSES

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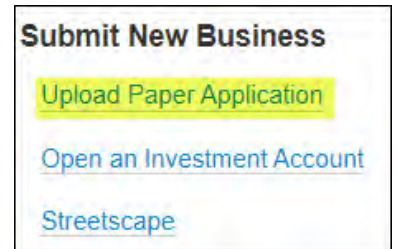
As part of our new onboarding system, changes were made to our licensing/appointment, continuing education and agent of record processes. The new system is now automated, eliminating manual work and allowing for a more streamlined process. Please make note of the following enhancements:

- **License/Appointment checks:**
  - **State license checks** now will be automated against the date the **application is received** rather than the date the application is signed. For applications submitted through one of our online application systems, this check will immediately notify the field associate that his/her license check has failed. Field associates will need to contact licensing and contracting at 800-388-8802, ext. 52059 to resolve the license issue before the application can be submitted.

- **Note:** Applications will not be accepted if the licensing check fails. If it fails, the field associate will receive a message on the screen alerting to the next steps. Additionally, there will be a **PM Connect webinar** – [Changes to Submitting Your Business in eApply](#) (password: Ameritas1) on **Thursday, Sept. 30 at 2 p.m. ET.**
- **Appointment checks** also will be fully automated. When a field associate submits an application through one of our electronic application systems, if he/she is licensed, but not yet appointed in the state in which the application is submitted, the system automatically will appoint the field associate so there is no delay from application submission and appointment.

**To take full advantage of these automated processes and prevent delays in application processing, it's important to use the Ameritas electronic application system.**

- **Paper application submissions** can no longer be uploaded to our website or emailed to home office associates. Applications must be uploaded on Producer Workbench using the “Upload Paper Application link,” which can be found on the Day-to-Day Tasks tile on the home page under Submit New Business. (See screenshot.)



- **New Business writing agent changes** will be systematically checked as of the date of the application is received to confirm valid state licenses.
- **Continuing Education process changes (including Regulation 187):**
  - State-required and product-specific continuing education must be completed in RegEd prior to submitting new applications, term conversions and service increases. System checks will save significant turnaround time.

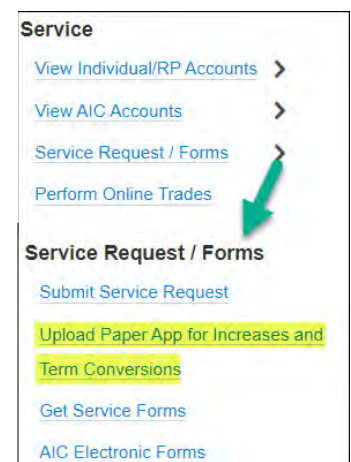
**Note:** Applications will not be accepted if the continuing education check fails. If the appropriate training has not been completed, the field associate will receive notification. Additionally, RegEd is the only accepted vendor for life and annuity training.

- Once the training has been completed, the application submission process can resume and signatures can be collected.
- **Writing agent changes** during underwriting also will be checked to confirm the new writing agent has completed any required product/state-specific training. However, Regulation 187 training needs to be completed prior to the to the application sign date.

- **Increases and agent of record process changes:**
  - **Solicited increases and term conversions:**\* All requests now must be submitted on Producer Workbench using the “Upload Paper App for Increases and Term Conversions link,” which can be found on the Day-to-Day Tasks tile on the home page under Service Request/Forms.

\* If using eApply for term conversions, continue to do so.

- **Agent of Record changes:**
  - For **license/appointment checks for agent of record:**
    - If the license check **fails**, the Agent of Record cannot be completed. The field associate will be notified accordingly.
    - If the license check **passes** and the appointment check fails, the Just-In-Time appointment process automatically will be implemented except for Pennsylvania. (See Just-In-Time reminder above.)



**Questions:**

- **For license/appointments checks**, contact licensing and contracting at [indlicensecheck@ameritas.com](mailto:indlicensecheck@ameritas.com) or 800-388-8802, ext. 52059.
- **For new business**, call 888-317-6719.
- **For increases and term conversion, contact** individual client services at [clientservices@ameritas.com](mailto:clientservices@ameritas.com) or 800-745-1112.
- For **Agent of Record changes**, contact, [indfieldcomp\\_linc@ameritas.com](mailto:indfieldcomp_linc@ameritas.com).

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