



New Agent Portal

Quick Overview and Navigation



Log In



User ID



Password

☐ Keep me signed in

LOG IN

Let's Get Started


The URL for the new agent portal is: agentportal.unitedhomelife.com


Your current agent number and password will work for the new portal. If you have problems logging in, please report them to the Marketing Team at UHL.Marketing@unitedhomelife.com


- Home
- Quote
- Policies
- Performance Metrics
- Commissions
- My Profile
- My Hierarchy
- Inbox
- Recruit Agent
- Resources
- Reports
- Logout




Hello Michael, what would you like to do today?


 Trip Status & Metrics

 View Commissions

 View Resources

 Quicklinks & News

 Launch eApp

 View Profile

START A QUOTE

Business Snapshot

Include downlines

Pending	Approved	Issued Not Paid	In-Force *
5	2	4	28
▲ 3			▲ 3

Quick Links

- [Contact Us](#)
- [About Us - FAQ's](#)
- [Double Production Credit - Winner's Circle 2022](#)
- [Subscribe to Newsletter](#)
- [More Links](#)

News & Updates

The Human Cost of COVID and The Importance...
 Statista recently published an article and chart about the human cost of COVID. For the article, a Pew Research analysis of CDC data has put the human toll of COVID in the U.S. into stark perspective...
[View full story](#)



Why Sell UHL/UJFL?

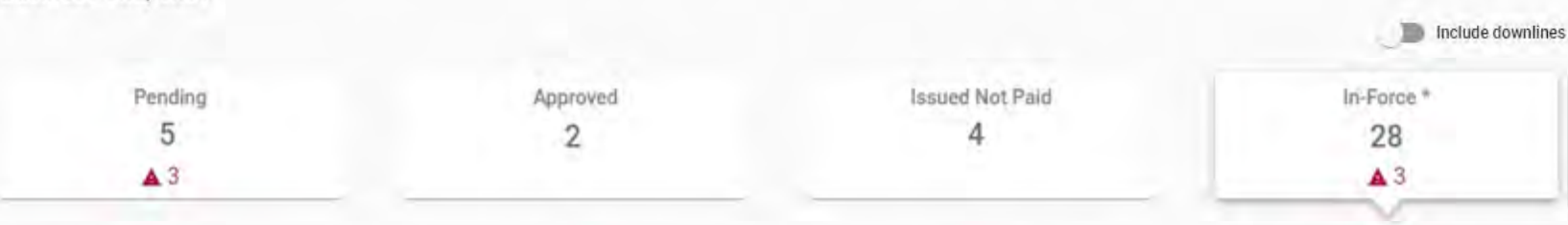
UHL/UJFL offers a wide variety of simplified coverage options and excellent customer service.
[View full story](#)

[More news...](#)

Dashboard

Quickly navigate to everything you need to manage your book of business, whether you're looking for resources, Winner's Circle trip status, commission statements, metrics, to launch our eApp, or to view your profile. Just below, you'll find the Business Snapshot. This includes your business at a glance, including pending, approved, issued not paid, and in-force applications. If you need to view your hierarchy, recruit, view reports, etc., you can find these items on the menu.

Business Snapshot



In-Force (*last 60 days)
3 require action

[View all policies](#)

Policy: W801955			
Insured: Annual Premium: \$921.86	Plan: SIMPLE TERM 20 ROP Face Amount: \$50,000	Application Type: Paper Payment Mode: DIRECT	Action Required: 1 item needed >
Policy: U506260			
Insured: Annual Premium: \$1,841.04	Plan: EXPRESS ISSUE PREMIER Face Amount: \$50,000	Application Type: EApp Payment Mode: EFT	Action Required: 1 item needed >
Policy: U506141			
Insured: Annual Premium: \$803.40	Plan: EXPRESS ISSUE PREMIER Face Amount: \$25,000	Application Type: Paper Payment Mode: EFT	Action Required: 1 item needed >
Policy: W801990			
Insured: Annual Premium: \$452.68	Plan: SIMPLE TERM 30 Face Amount: \$75,000	Application Type: Paper Payment Mode: DIRECT	>
Policy: W801975			
Insured: Annual Premium: \$632.52	Plan: GUARANTEED ISSUE WHOLE LIFE Face Amount: \$5,000	Application Type: Paper Payment Mode: DIRECT	>
Policy: W801972			
Insured: Annual Premium: \$1,444.92	Plan: SIMPLE TERM 30 Face Amount: \$200,000	Application Type: Paper Payment Mode: EFT	>
Policy: W801971			
Insured: Annual Premium: \$339.84	Plan: EXPRESS ISSUE WHOLE LIFE Face Amount: \$5,000	Application Type: Paper Payment Mode: DIRECT	>

Business Snapshot

Your Business Snapshot provides you with a quick overview of your book of business. You can quickly view and sort through the applications in each status. A red icon will appear on the tile if there are any actions required in that group of policies. The number to the right of the icon represents the number of outstanding actions.

Policies

Search by Insured Name

Filtered by: Policy Status: All View: Myself Agent Status: Active Date: 8/25/2020-8/25/2021

[Edit filters](#)

Policy count by status with Annual Premiums

Active:	47	\$26,570.76
Declined:	2	\$2,127.68
Incomplete:	3	\$2,498.64
Issued Not Paid:	1	\$2,983.80
Not Taken:	5	\$4,544.76

Total Policies

58

Total Annual Premiums

\$38,725.64

Policy #	Insured Name	Status	Date Issued	Face Amount	Paid-to-date	State	
		Issued Not Paid	08/17/2021	\$12,000	08/17/2021	VA	
		Active	08/12/2021	\$9,000	09/12/2021	VA	
		Active	08/11/2021	\$11,000	09/11/2021	VA	
		Active	08/10/2021	\$125	09/10/2021	FL	
		Active	08/03/2021	\$250	09/03/2021	VA	PROTECTOR AD
		Active	08/10/2021	\$250	09/10/2021	KY	PROTECTOR AD
		Active	08/10/2021	\$6,000	09/10/2021	KY	GUARANTEED ISSUE WHOL...

Filter results by:

View

Myself

Agent Status

Active

Date Range

8/25/2020 – 8/25/2021

Policy Status

Policies

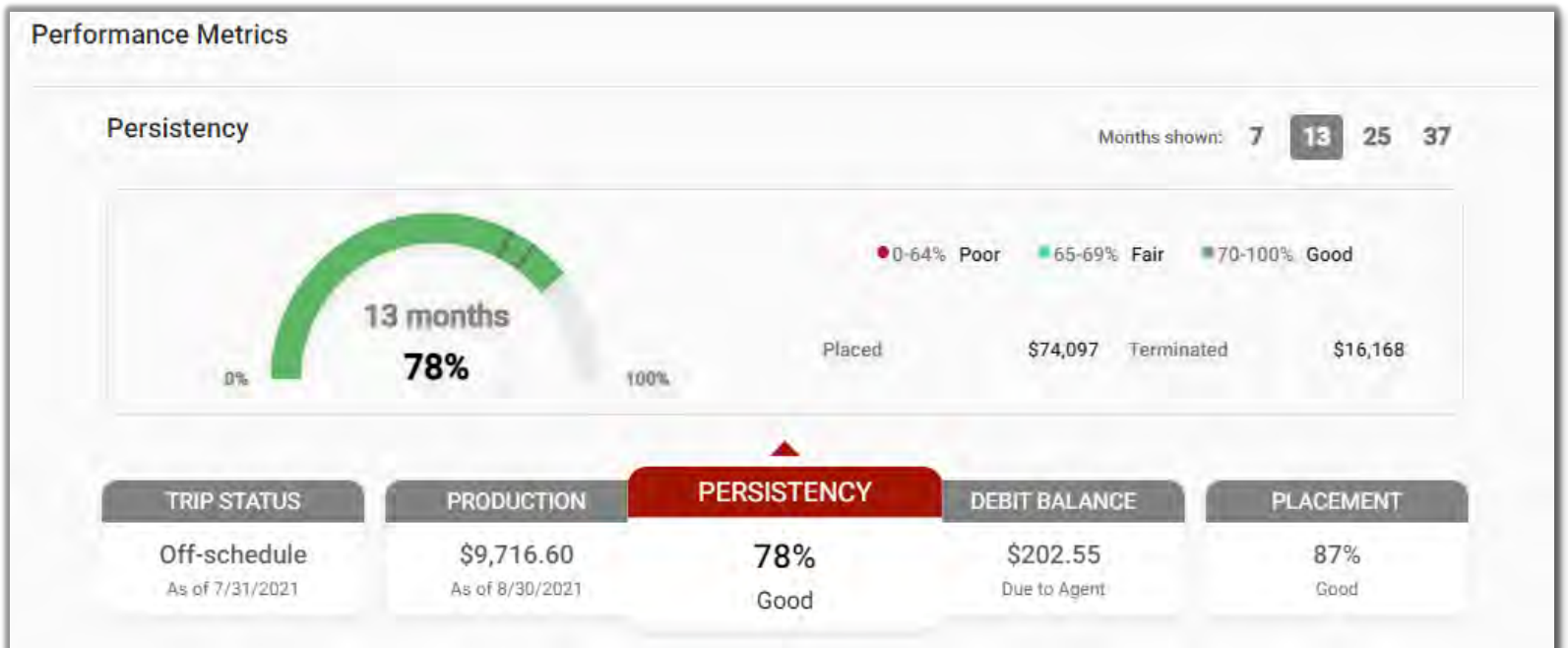
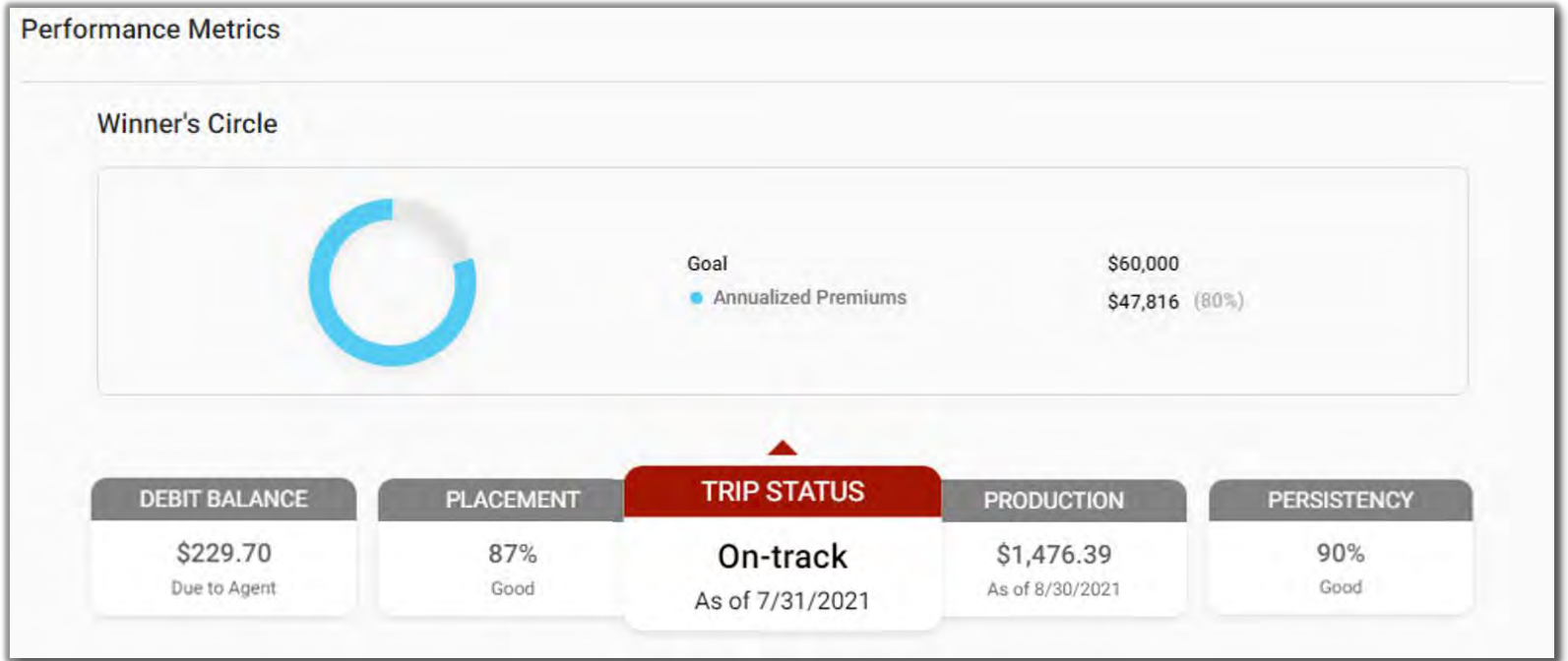
We've made the Policies section of the agent portal easy to navigate and understand. To access your book of business, go to "Policies" on the menu.

The sorting functionality is much greater and provides much more information than its predecessor. Instead of sorting by just one filter, you can sort by up to four.

Production statistics often requested are also provided for quick research needs.

Performance Metrics

Here you can view your statistics for Winner's Circle trip status, production, persistency, placement, and debit balance. A brief summary is provided, with a more detailed explanation when clicking a specific tile. In addition, options are available to view persistency percentages for 7, 13, 25, and 37-months.



Recruiting Agents

We've made recruiting easier. Quickly initiate a new eContracting packet by clicking "Enter new recruit", obtain Change Forms to make updates to existing agents, and see recruiting history - all on one page!

The ability to include recruiting of downline agents is also available when appropriate.

Recruit Agent

Grow your business by recruiting downline agents! Select Enter Recruit to enter a prospective agent. Once submitted, an eContracting packet will be emailed to your recruit. You can also download change forms and view your recruiting history from this page.

Enter new recruit

Change Forms

Recruiting history

Include my hierarchy:

No

Yes

Recruit Name	Recruit Email	Agent Type	Contract Level	Commission	ANZ%	Date Submitted
		GA	3040	Pay at Issue	75	8/17/2021
		GA	3040	Pay at Issue	75	8/17/2021
		GA	3040	Pay with premium	50	8/13/2021
		GA	3040	Pay with premium	50	8/13/2021
		GA	3040	Pay at Issue	75	8/10/2021
		LOA	3000	No Annualization	0	8/6/2021

Enter New Recruit

Recruiter

Agent Code: F000600000
Name: UHL UFFL DIRECT
Contract Level: [Change Recruiter](#)

Prospective Agent Info

AGENT TYPE
General Agent

SCHEDULE

LAST NAME
Agent

FIRST NAME
Jane

EMAIL ADDRESS
agent@insurance.com

STATE
Indiana

CONTRACT LEVEL
3104-FE45

Final Expense Whole Life

Yr 1: 45.00 Yr 2: 7.00 Yr 3-5: 3.00 Yr 6-10: 1.00

GIWL

Yr 1: 25.00 Yr 2-10: 1.00

Provider Whole Life

Yr 1: 55.00 Yr 2: 8.00 Yr 3-10: 3.00

Accident Only

Yr 1: 45.00 Yr 2-5: 1.00

COMMISSION PAYMENT TYPE
Pay at Issue

COMMISSION PERCENTAGE
75%

SUBMIT

Recruiting Agents

Initiating eContracting packets with the new agent portal will function a lot like the old version, but with faster response times. Enter the necessary information, double-check it's correct, and submit. A packet number will be provided.

Once the packet is submitted, the agent being recruited will receive an email from Producer Express (producerexpress@sircon.com). Have the agent follow the prompts and complete.

If changes are needed for downline agents, click on the "Change Forms" button to download the necessary forms to submit your request.

← Change Forms

Use the forms below to request changes for you or your downlines. If you cannot find what you need, please contact us at uhl.contracting@unitedhomelife.com.

[EFT Authorization Form](#) ?

[Appointment Transmittal](#) ?

[Commission Option Agreement](#) ?

Resources

Our Resources section combines the Applications, Marketing Materials, Supplemental Forms, Training, and News.

Each section will have filtering capabilities to help you find the form you need, faster.

All client and agent sales information can be found in the Marketing Materials section.

Supplemental Forms, necessary for client EFT changes, claims, and additional underwriting forms are located in this section.

Training videos and webinars can be found under Training.

Resources

Applications

Marketing Materials

Supplemental Forms

Training

News

Refine

State

Florida

Results

Sort by

Name (Ascending)

Child Rider Application - Florida

Date Created: 06/08/21

Guaranteed Issue Whole Life - Florida

Date Created: 06/08/21

Protector AD Application - Florida

Date Created: 06/08/21

Provider Whole Life Application - Florida

Date Created: 06/08/21

Reinstatement Application - Florida

Date Created: 06/08/21

Replacement Form - Florida

Date Created: 06/08/21

Simplified Issue Whole Life - Florida

Date Created: 06/08/21

Term Life Application - Florida

Date Created: 06/08/21

Reports

Select a report below to run and view details



Winner's Circle Status

Trip status for all downlines



Debit Balance

Debit balance data



Paid-to-Submit Ratio

Total paid apps divided by total submitted

Reports

Manage your downline agents with downloadable reports. Currently, Winner's Circle, Debit Balance, and Paid-to-Submit Ratio reports are available. More are on the way. Stay tuned.

New QuickQuote™

It's just as simple as the old version but provides a better experience quoting your clients. Now, you can quote all whole life products at once and proceed to completing an eApp, with an easy-to-use mobile-friendly format.

Getting a **life quote*** is easier than ever. Let's get started!

AGE

29

Use date of birth instead

Insurance Age 29

STATE

Arizona

SEX

Female

TOBACCO USER

No

PRODUCT TYPE

Whole Life

PRODUCT

All

PAYMENT FREQUENCY

Monthly EFT

NEXT

*Quotes generated are for agent use only and not to be shown directly to clients. Use the option to print or email to share with clients to ensure they see all the appropriate disclosures.

*A quote is not a guarantee that coverage will be issued and may be slightly different than actual premiums due to rounding.

← Back

Express Issue Whole Life

Range: \$2,000 - \$25,000

Face Amount

\$ 25,000

Premium

Child Rider

Accidental Death

Premium:

\$120.04

Face Amount:

\$25,000

APPLY NOW

Show rate table

Express Issue Deluxe

Range: \$5,000 - \$50,000

Face Amount

\$ 25,000

Premium

Child Rider

Accidental Death

Premium:

\$63.77

Face Amount:

\$25,000

APPLY NOW

Show rate table

Express Issue Premier

Range: \$5,000 - \$100,000

Face Amount

\$ 25,000

Premium

Child Rider

Accidental Death

Premium:

\$40.13

Face Amount:

\$25,000

APPLY NOW

Show rate table

Guaranteed Issue Whole Life

Applicant does not qualify

This product is only available for ages 45 - 75


How to Add Agent Portal to Smart Device

iPhone Instructions

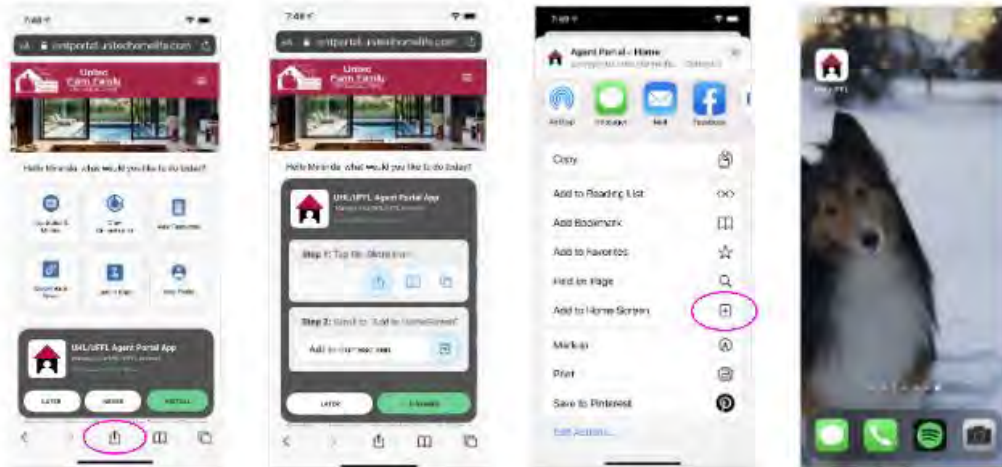
To add the Agent Portal to the Home screen on an iPhone you must use **Safari**.
Chrome and Firefox are not supported.

Safari

With this page open in Safari on your iPhone:

Tap the share icon 

Tap Add to Home Screen.



Android Instructions

To add the Agent Portal to the Home screen on an Android device you must use **Chrome** or **Firefox** as your browser.

Chrome

With this page open in Chrome on your Android device:

Tap the menu icon (⋮) at the top of your browser.

Tap Add to Home Screen or Install App.

Follow the onscreen instructions to install.



Firefox

With this page open in Firefox on your Android device.

Tap the menu icon (⋮) on your browser.

Tap Install.

On your Home screen, drag the shortcut to your preferred spot.

