

eApp Best Practices

eApp – It's a better way of doing business, built to increase efficiency and speed. It's important that our agents understand how to conduct sales via eApp properly, which include these two critical parts of our process:

- The Company's eApp Signature Statement of Policy, to which agents must agree for access to the eApp system, says agents may not under any circumstance click-sign for any party other than themselves. Each appropriate signor of the application must click-sign for him/herself. There are no exceptions to this policy. As stated in the eApp Statement of Policy which agents must agree to before having access, abusing the use of eApp can lead to the termination of an agent's contract. Our New Business and Underwriting areas monitor all business, including eApps.
- eApp cannot be used as a word processor for paper apps. Taking a paper app, complete with signatures, cannot then be entered into eApp by the agent to save time. A client's signature on a paper application cannot be construed as giving permission to the agent to click-sign for the client. Submit the completed, signed paper app instead. Using eApp as intended will greatly improve the efficiency of the entire process, which means faster commissions! If you would like more information about best practices for eApp, please visit the eApp Locker Room.

