

Product & Service Notice



Date: Nov. 10, 2023
To: Ameritas Field Associates

Form Number: PS 4419 REVISED
Product Area: Life and DI (excludes SIUL and VUL)

RE: Enhancements to requirements upload feature

Summary:

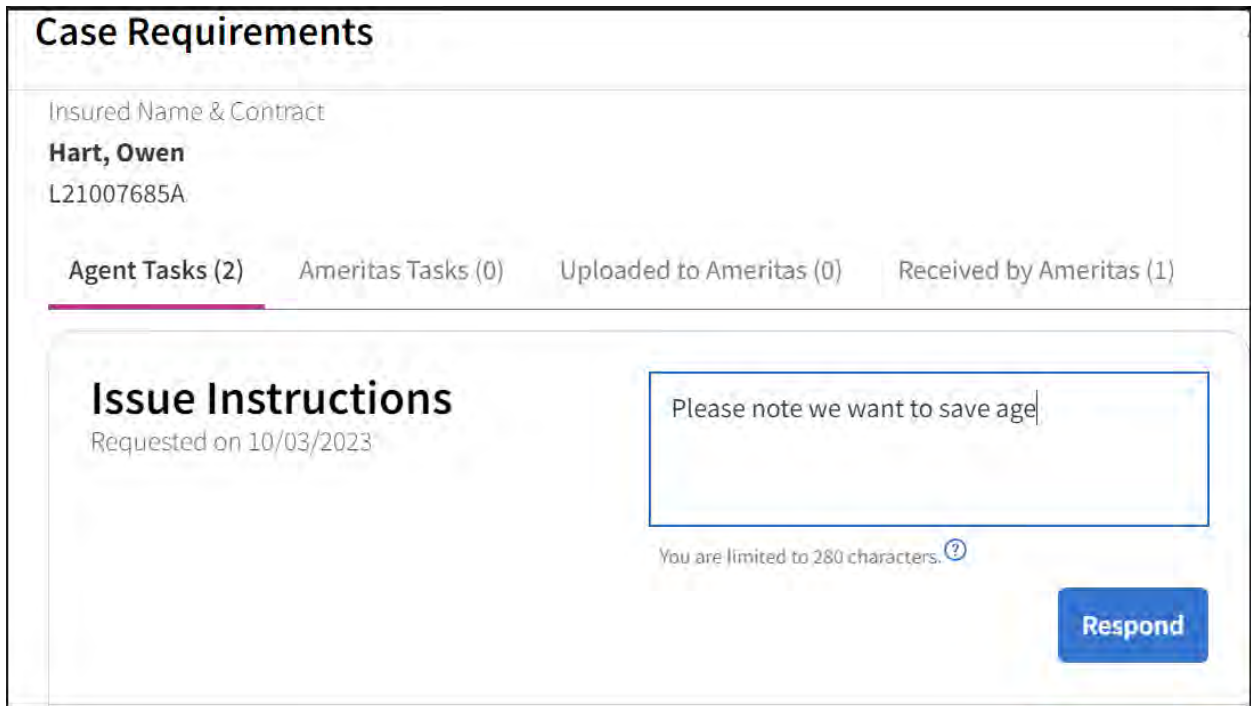
We previously introduced a feature that allows you to upload requirements through Producer Workbench. This feature provides a “Requirement” button and option to drag/drop the required pdf – sending the document directly to underwriting or the new business inbox within 15 minutes. With our latest enhancement you can now provide issue instructions by typing a comment into the comment box. This is in addition to using the comment box to fulfill the requirements for Offer status and MISC Admin status announced in a prior release.

Additional Information:

Requirements can be met by either uploading a file(s) or by typing into the comment box – but not both. The functionality to enter comments is now available for “Issue Instructions,” “Misc Admin” and “Offer” statuses (additional statuses will be available as work progresses).

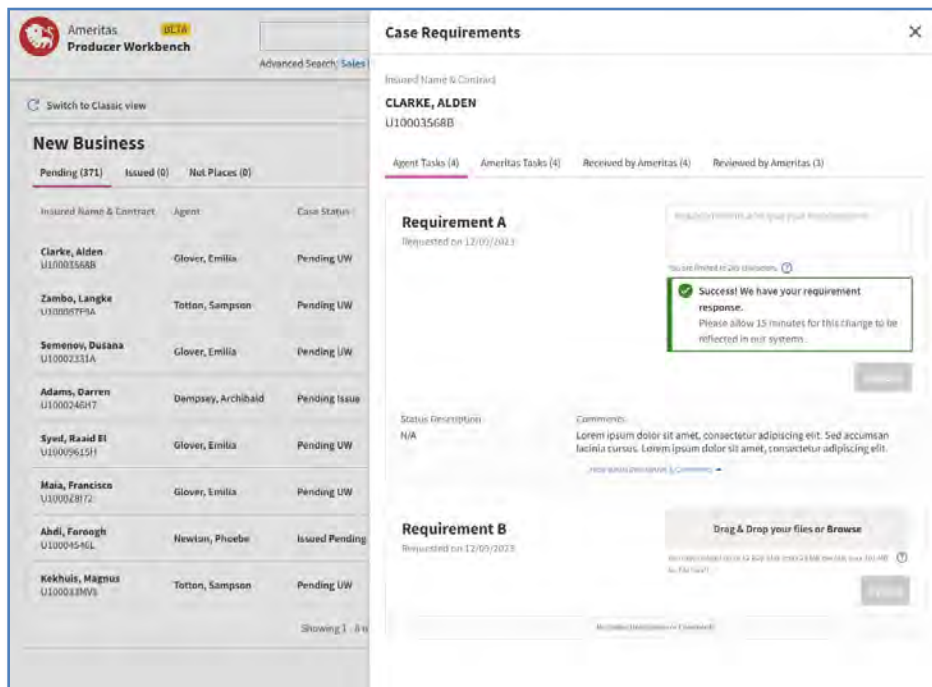
The screenshot shows the Ameritas Producer Workbench interface. On the left, there is a sidebar with a 'New Business' section containing a table of pending cases. The main area displays a 'Case Requirements' window for 'CLARKE, ALDEN' (U10003568B). The window shows 'Requirement A' and 'Requirement B' with their respective status descriptions and comment boxes. Requirement A has a status description of 'N/A' and a comment box. Requirement B has a status description of 'N/A' and a file upload area with a 'Drag & Drop your files or Browse' button.

Insured Name & Contract	Agent	Case Status
Clarke, Alden U10003568B	Glover, Emilia	Pending UW
Zambo, Langke U100087F9A	Totton, Sampson	Pending UW
Semenov, Dusana U10002333A	Glover, Emilia	Pending UW
Adams, Darren U1000246H7	Dempsey, Archibald	Pending Issue
Syed, Raaid El U10009615H	Glover, Emilia	Pending UW
Maia, Francisco U100028772	Glover, Emilia	Pending UW
Abdi, Forough U10004546L	Newton, Phoebe	Issued Pending
Kekhois, Magnus U100033MVS	Totton, Sampson	Pending UW



While typing your message, a red alert will let you know how much of the 280 character limit is remaining. After finishing your message, click “Respond.”

Once your response is received, “Success! We have your requirement response.” message will appear.



Look for ongoing enhancements and additional functionality to be announced.

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