

# New General Purpose Application

471NB

**Date:** January 25, 2024

**Effective:** January 27, 2024

North American continues to look for ways to improve overall experience and streamline processes for you and your clients. We've recently updated the following forms:

Form name	Previous form number series	New form number series
Part 1 eApplication	ICC17L3206B REV 1-20	ICC23A100NAC REV 1-23
General Purpose Application	ICC19L3208B REV 1-20	ICC23A101NAC REV 1-23* (and applicable state variations)

\*Refer to FormsFactory for state variations.

The above forms will be available on FormsFactory and SimpleSubmit<sup>®</sup> by January 27, 2024. The previous versions of the forms will no longer be accepted if they are signed March 1, 2024, or later.

## Availability

The new forms are available in all states and territories except California.

## State Specific Updates

- South Carolina: Application only is moving from ICC to non-ICC.
- North Dakota & Delaware: Application and all Underwriting forms are moving from non-ICC to ICC.
- Refer to FormsFactory for updated form numbers for the above states.

## Changes to the General Purpose Application and SimpleSubmit

Changes were made to several fields on the General Purpose Application and SimpleSubmit screens. These enhancements should be self-explanatory and easy to follow during the completion process. Some notable updates include:

- **Social Security Number:** All fields for the social security number have been updated to be labeled as a request for the social security number or tax identification number.
- **Email Address:** All roles on the application now include a field to provide the email address.

## Field Bulletin

- **Driver's License:** Questions have been updated so you can easily choose from a list of reasons as to why a client does not have a driver's license, versus having to write in the details.
- **Premium Qualification Test:** Application no longer indicates a default of Guideline Premium Test. Please note, if no Premium Qualification Test is selected, a requirement asking what Premium Test is preferred will be added.
- **Purpose of Coverage:** Two new questions have been added regarding the purpose of coverage.
- **Payor:** Helper text on the General Purpose Application has been updated to indicate that the Certificate of Business Signing Authority is only needed for the payor being a business when the mode of payment is EFT.
- **Secondary Addressee Notification:** Field for 'Third Party Billing Notification' was updated to 'Secondary Addressee Notification'. This field is still optional to complete and should be completed if the client wants to indicate another party to receive grace and insufficient premium notices.
- **Premium Certification:** Question was separated into two questions, and the wording was updated to be easier to understand.
  - Based on the prior verbiage, the question would be answered yes to certify that premium was not coming from one of the sources listed.
  - Based on the new verbiage, if premiums are not coming from a source listed, the question should be answered no.
- **Lifestyle and Underwriting/Medical Questions:** Several questions have been updated on the General Purpose Application. Please be sure to read questions carefully when completing the new application.
- **Authorization Page:** Verbiage in the 'Effective Date' and 'Authorization' section have been updated. Please be sure to review these changes thoroughly to avoid misunderstandings.

**Please contact your dedicated New Business team for any questions.**

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