Introducing SimpliNow Choice℠ platform with a NEW online client completion path!

corebridge financial

Ready for a faster experience with real-time offer capability?

When placing a Term case in the SimpliNow Choice platform on iPipeline, your initial inputs will predetermine if the 'Agent Drop Ticket + Client Collaboration' submission path is available. This submission path uses the NEW online client completion application and has the potential to result in a real-time offer!

New online client completion path!
- Potential real-time offer
- 20% Fewer medical questions
- Added convenience

Frequently asked questions

Q. Should I select the client completion submission path for all my healthy clients?

A. This submission path is good for those clients who you believe would be comfortable filing out the online forms independently and are motived to complete the application. It also makes the exam much shorter even if they do not stay lab-free.

Q. Will my client still be eligible for a real-time offer if I pick a submission path other than 'Agent Drop Ticket + Client Collaboration'?

A. Unfortunately, as it is set up today, the client completion path is the only path that provides a real-time answer. However, the tele-interview paths still instantly tell the client if they qualify for a lab-free process. We will be working towards adding real-time answers to other paths in the future.

Q. I've completed many Part B forms with my clients. If my client calls with questions, can I use the Part B I'm familar with to help guide them through the new client completion Part B?

A. While normally that would work, in this case, our new Part B is currently only in the eApp paths (client or agent completion), but not if you look at the paper versions that are available.

Q. Are the medical history questions the same in the current and the new client completion Part B?

A. Both documents get us all the information to make a thorough decision on your client, but the new client and agent completion Part B is rearranged to give your client fewer free form answers and is easier to complete without industry expertise.

Q. My client is outside the Term Agile Underwriting+ parameters (ages 20-59, $1M face or less), can I still select the 'Agent Drop Ticket + Client Collaboration' submission path?

A. Absolutely as this path still allows your client to go through the process on their own time, pace and convenience and shortens the paramed "exam" to a lab collection only experience. Also, if you think a client might struggle with language when speaking to a tele-interviewer or a paramed, the client completion path allows them to take their time to understand all the questions and give their answers. The application will move to underwriting review after the lab requirement is fulfilled.

Q. What do I need to do to ensure my client gets their online application?

A. First, make sure you have selected the 'Agent Drop Ticket + Client Collaboration' on the Submission Path screen. Continue through the path and once you arrive on the Agent Attestation screen, below the agreement button, you will see Send to Client with your client's email address and phone number. Review to ensure they are correct, and then click the Send Invite to Client button. Afterwards you will see, a green checkmark that your client can begin their portion of the application.

Q. Is my signature required on the client completion forms?

A. This process is similar to the tele-interview process in that your attestation on the ticket portion will affix your signature on the appropriate forms.

Policies issued by **American General Life Insurance Company** (AGL), Houston, TX except in New York, where issued by **The United States Life Insurance Company in the City of New York** (US Life).

Q. How much time is needed for my client to complete their Part B?

A. 20 to 30 minutes

Q. Can my client pause and resume after closing their browser window?

A. Yes, however they must use the auto-generated PIN to access their portion of the application. This allows their progress to be saved and lets them finish later. To resume the application, they will need to log back in from the link in their email to complete the requirements.

Q. What happens if my client agrees to complete the online application but after receiving the email notification or after starting the application completion process, they do not finish it but are still interested in obtaining coverage?

A. You may unlock the case and change the submission path to another available option if the client did not lock the application after verifying their information and moving on to the 'Authorization Forms'. If your client locked the application and needed to make changes or decided against completing it, you will need to start a new case.

Q. How will I know when my client has completed their online application?

A. In Connext, our agent portal, your My Business Dashboard will post the information in real-time. If you signed up in Connext to receive New Business Underwriter Decision Notifications, you will receive a confirmation email within 2-hours from American General Life/US Life that your client's application has been completed.

Q. How do I turn on New Business Underwriter Decision Notifications?

A. Log-in to Connext, Click your name in the upper right-hand corner. Click Notification Settings and you can choose your email preferences. See Connext Notifications Guide for further detail.

Q. Will the shorter client completion Part B become the agent completion Part B as well?

A. Yes, the shorter version Part B in the eApp platform's client completion path is also the same as your agent completion path; however, in the other submission paths or when submitting paper applications, the Part B will remain as it is today.

Q. Is the 'Agent Drop Ticket + Client Collaboration' submission path available on all Corebridge Financial products.

A. It is currently only available for our Term products, but the vision is to continue to add products to this submission path over time.

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