LIFE SOLUTIONS

The Lincoln Leader

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HEADLINES

New Delegate Access Now Available on the Lincoln eSubmission Portal

For Lincoln eTicket and MoneyGuard® eApp Submissions

Effective April 22, 2024, Lincoln is excited to expand delegate user capabilities to include data collection for life eTicket and MoneyGuard eApp submissions in the Lincoln eSubmission Portal on behalf of a Financial Professional. This expanded access allows a Financial Professional to permission a delegate to provide additional administrative support for a policy, so they can focus on other critical functions.

Who are delegate users, and what can they do?

A delegate user is a registered user of the Lincoln producer website who is given permission to view information on the pending website and/or perform New Business transactions on behalf of a Financial Professional.

Delegate users can utilize the following New Business pending website functionalities:

- *NEW* Lincoln eSubmission Portal: Input data for a Lincoln eTicket or MoneyGuard eApp submission
- eNIGO: Leverage eSignature to electronically satisfy not-in-good-order form requirements
- Two-way Communication: Satisfy outstanding questions and/or requirements online
- Click-to-Chat: Chat online with a New Business Contact about your case
- Send emails and/or upload files to New Business

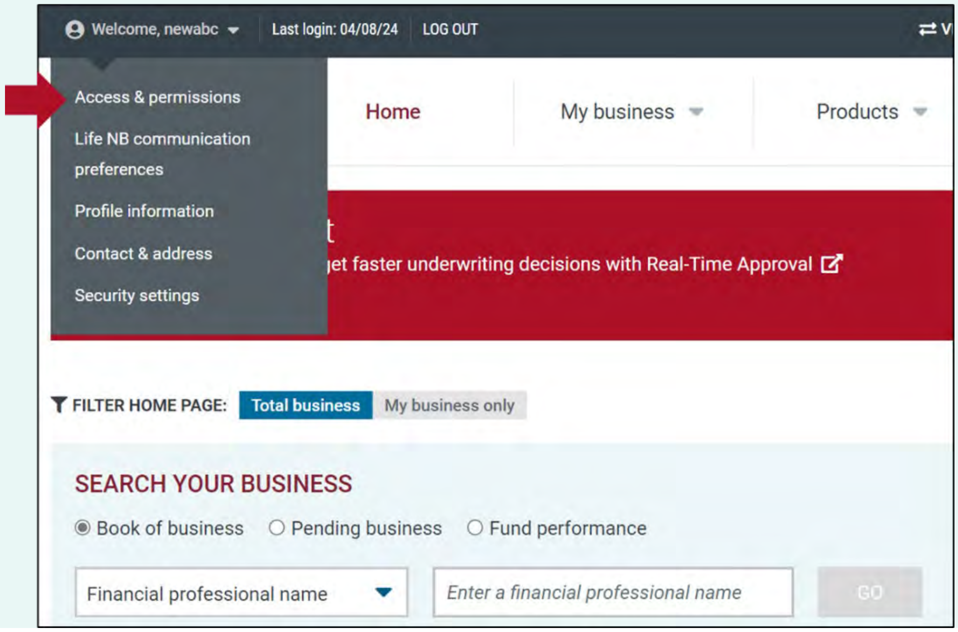
Granting access for a delegate user

From the Lincoln producer website, delegate access can be granted as follows. Permissions can be set for “view only” or “perform transaction”.

1. Financial Professional can grant access to a new delegate
2. Financial Professional can update access for an existing delegate
3. Registered website user (back-office staff) can request delegate access from a Financial Professional

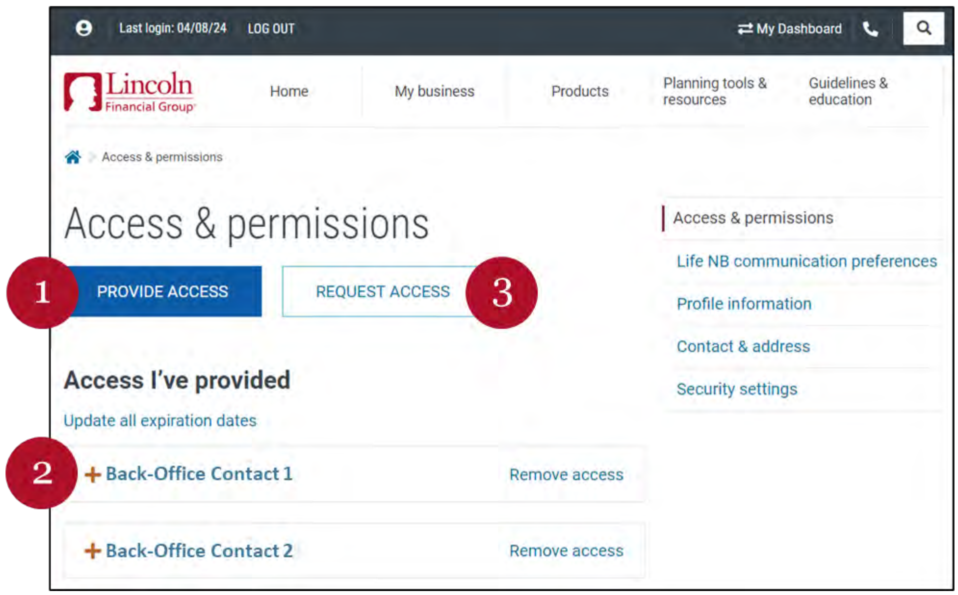
Getting started

- Log in at LincolnFinancial.com
- Select "**Access & permissions**" from the "Welcome" drop down menu



Access & permissions

1. To grant access to a **new delegate**, the Financial Professional will select **PROVIDE ACCESS** and enter the information for their delegate.
2. To update access and permissions for an **existing delegate**, the Financial Professional will select the "**+**" beside the name of the delegate under the "Access I've provided" section, then select "**Edit permissions**".
3. To **request delegate access** from a Financial Professional, the registered producer website user will select **REQUEST ACCESS** and enter the email address for the Financial Professional to start the process.

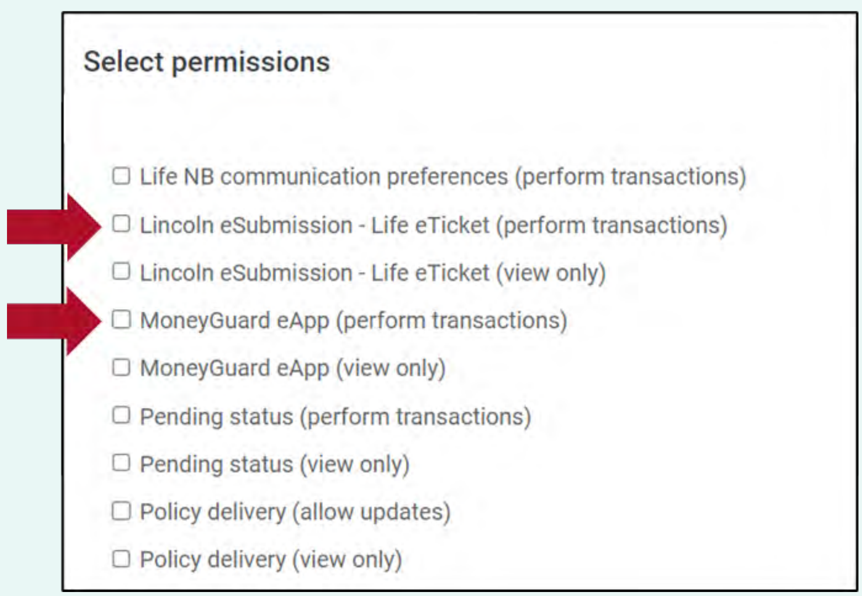


eSubmission Portal: Selecting permissions

A delegate user can be granted "view only" or "perform transaction" access for all New Business functions shown below.

To permission a delegate access to input data on behalf of a Financial Professional for a Lincoln eTicket or MoneyGuard eApp submission, select the following options:

- Lincoln eSubmissions – Life eTicket (perform transactions)
- MoneyGuard eApp (perform transactions)



Delegate confirmation email

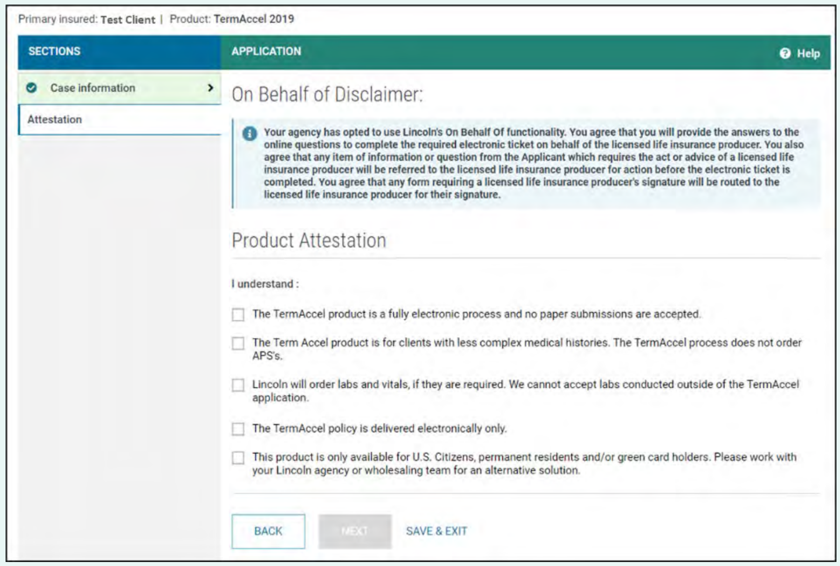
When a Financial Professional adds a new delegate, or updates permissions for an existing delegate, the delegate user will receive an email from Lincoln to confirm their access. Before access is complete, the delegate will be required to:

- **"Review"** the information provided to Lincoln
- **Read and "Agree**" to the Privacy Agreement
- **Click "Submit"** back to Lincoln confirming access

Delegate Users: Starting a new case in Lincoln's eSubmission Portal

A delegate user can start a new case for a client, on behalf of the Financial Professional, and enter all data up to and including "locking" the case for agent review. The following message will be displayed on the attestation page of the application for all users logged in as a delegate in Lincoln's producer website:

"Your agency has opted to use Lincoln's On Behalf Of functionality. You agree that you will provide the answers to the online questions to complete the required electronic application on behalf of the licensed life insurance producer. You also agree that any item of information or question from the Applicant which requires the act or advice of a licensed life insurance producer will be referred to the licensed life insurance producer for action before the electronic application is completed. You agree that any form requiring a licensed life insurance producer's signature will be routed to the licensed life insurance producer for their signature."

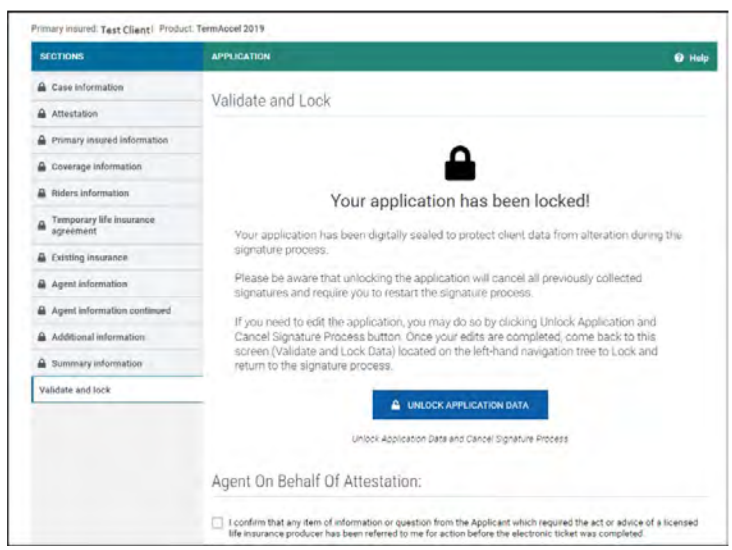


Once the delegate user locks the application, they cannot continue further; the Financial Professional must resume the case. **The delegate will be required to manually notify the Financial Professional of the case status so they can login and continue the process.**

The expectation remains that the Agent will review the collected information and make any changes necessary before the signing process begins.

The following "On Behalf Of" Attestation message will be displayed to the agent on the "Validate and Lock Data" screen when they open the application, and will need to be affirmed via the checkbox before the agent can proceed:

"I confirm that any item of information or question from the Applicant which required the act or advice of a licensed life insurance producer has been referred to me for action before the electronic application was completed."



Resources	Visit www.LFG.com/GoDigital for more information about all of Lincoln's eCapabilities, including eSubmission Portal or the producer pending website.

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Life eTicket and MoneyGuard eApp iPipeline Update

Important information for Lincoln producer website users

As previously communicated, with the launch of Lincoln's new eSubmission Portal in February, all new Lincoln life eTicket and MoneyGuard eApp cases are now submitted through the new Lincoln portal.

Important information for Lincoln producer website users

After April 26, 2024, the Lincoln eSubmission Portal will be the only submission tool available for Life eTicket and MoneyGuard eApp submissions. Any case that is open in iPipeline must be submitted to Lincoln **by April 26**. After this time, any outstanding case must be restarted and submitted through the Lincoln eSubmission Portal.

Note: For partners that have a direct account with iPipeline, there will be NO CHANGE in that experience. Producers will continue to log in directly to iPipeline for all life and MoneyGuard electronic submissions to Lincoln.

View Lincoln eSubmission Portal Launch Article

Online Contact Information Changes

The newest feature available in your Lincoln online account

Lincoln is excited to announce that life insurance and **annuity Financial Professionals can now update their contact information in their online account** instead of using a paper form.

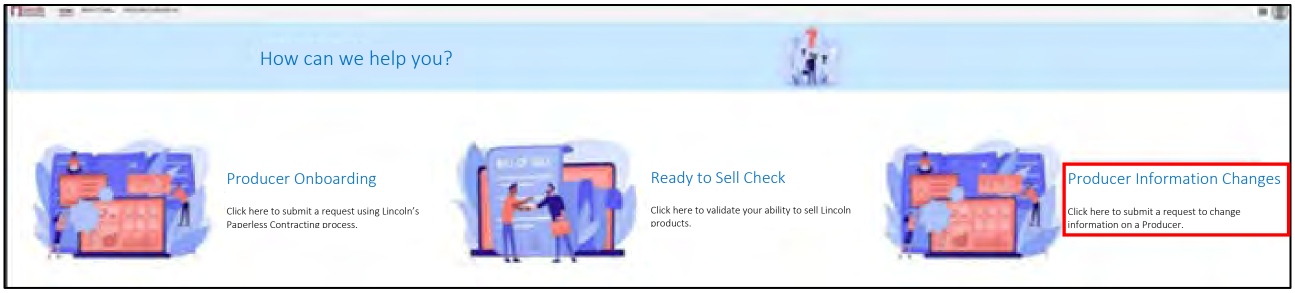
The Producer Information Change Form (which allows you to update your name, business address, home address, phone number, email address, and more) can now be completed from the comfort of anywhere with just a few clicks **— no need to print, fax, or mail anything!**

What You Need to Know

- ✓ This feature is only available for financial professionals and principals; **it is not available for back-office users**.
- ✓ This feature only updates the information in Lincoln's systems, **not the information displayed on your online account**.
- ✓ To utilize this feature, users **must have or create a LincolnFinancial.com account**.

How to Access

1. To make contact information changes, the user will need to register **or log into their online account** at LincolnFinancial.com.
2. Once logged in, those with access can open the **Ready to Sell Lookup tool** from the shortcuts menu on the right -hand side of the homepage.
3. From there, the user will be directed to a landing page where they will select **Producer Information Changes** from the options listed.



4. The user will then be directed to an electronic version of the **Producer Information Change Form.**
5. **The basic information at the top is required**. If the information is not filled in, it will not allow the user to submit any changes.
6. Next, fill out **only the section of the form** (or the entire form if needed) with the **new information that needs to be changed** (filling out previous information is optional only.
7. When finished, click **Submit** in the bottom right-hand corner. For questions, please contact Producer Solutions Customer Service at 800-238-6252.

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Lincoln Leader Update

Updated links for Life Lincoln Leaders

A recent technology update resulted in some broken links in Lincoln Leader newsletters distributed before March 2024. To access previous Lincoln Leader newsletters, use the links in the resources below or contact your Lincoln representative.

Access previous Life Lincoln Leaders

Lincoln Leader archive

Access previous newsletters here (must be logged in to LFD.com)

Looking for an article?

View the Index of Articles for past issues of the Lincoln Life Leader.

Resource Roundup

Don't miss any of the useful resources shared in this newsletter. Below is a summary of links.

Article: New delegate access now available on the Lincoln eSubmission Portal

Lincoln's eCapabilities:
LFG.com/GoDigital

eSubmission Portal

Producer Pending Website

Flier: Lincoln eSubmission Portal Launch Article

Article: Online Contact Information Changes

Register for an online account

Log into online account: LincolnFinancial.com

Go Digital

Be sure to check out the **GoDigital website** your one-stop shop for all Lincoln digital capability resources!

State Approvals

Last Updated 4/15/2024

View State Availability Grids

Looking for an article?

View the Index of Articles for past issues of the Lincoln Life Leader or visit the Lincoln Leader archive page on your producer websites.

Lincoln Leader archive

Access previous newsletters here (must be logged in to LFD.com)

Explore our Blogs

Help solve a range of client income needs through holistic planning. See the latest blog.

Market Intel Exchange

Market data and insights from Lincoln and industry asset management partners. Market Intel Exchange (PDF)