Ticket Application Scheduling and Interview Tips

Setting up the interview involves two components; placing the order and scheduling the interview.

Ordering

Call LTCG to place an order for an Asset-Care or Annuity Care interview. Follow the phone prompts and do not zero out. By pressing zero, you will be transferred out of the dedicated OneAmerica® phone line.

- Be prepared to provide the following information:
  - — Client first name/last name
  - — Client social security number
  - — Client date of birth
  - — Client gender
  - — Client address
  - — Client resident state or "contract state"
  - — Client phone number for the interview
  - — Agent name
  - — Agent phone number
- List the LTCG NCL number (reference number) on the ticket application.
- If you have the client's availability, relay to LTCG you also wish to schedule the interview for the client.
- You may also ask LTCG to reach out to the client to schedule their interview.
- If the client does not have any schedule restrictions, ask LTCG for the first available interview.
- Provide your clients a copy of the Pre-Interview Worksheet. This will help them gather the necessary information prior to the interview.

Interview

- Generally the interview will take 30–45 minutes per applicant. If the client has significant medical history or is utilizing translation services, the interview could last longer.
- LTCG schedules interviews in 1 hour blocks, allowing a 15-minute window at the beginning of the scheduled time in case the interview is delayed or there are connection issues. (As an example, an interview scheduled at 9 a.m. might not begin until the interviewer calls at 9:15 a.m.) We ask that you prepare your client for a possible delay (no more than 15 minutes) in receiving the call. If the LTCG interviewer calls within the 15 minute window, they will ask if they're able to complete the interview or would prefer to reschedule.
- If the client doesn't answer at the scheduled time, the assessor will attempt to contact the client twice (potentially more if an alternative phone number was provided). If able, they will leave a voicemail to contact customer service to reschedule.
- For clients who have back-to-back joint interviews, LTCG will hang up with the first applicant and then call the second client as scheduled. This helps ensure proper quality monitoring and recording for each interview.
- Prepare your clients to provide an authorization for verbal consent and a verbal signature. They will also be read the statement of understanding from the ticket application.

Please note

If the applicant is applying for both products, the agent should complete the full medical application for both products. OneAmerica Underwriting will review the applications determine if a phone interview is necessary. If it is needed, OneAmerica will schedule the appropriate interview.

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