

Verification Calls Guidelines

NEW

There will be dedicated 1-800 line for applicants to call in to have their applications verified. These are calls made by the agency staff, NOT HOME OFFICE VERIFICATION CALLS. Please review the guidelines below on how to effectively use this new tool.

- **888-227-1650**
- THIS LINE IS STRICTLY FOR INTERNAL VERIFICATION CALLS ONLY, WHICH MEANS THIS HAS NOTHING TO DO WITH HOME OFFICE, OR UW.
- HOURS – 9 am to 5 pm EST, Monday through Friday. Excluding holidays.
- We will try our best to answer every call, but this not always be possible. If they need to leave a message, please make sure they let us know their name, agents name, and best time to call.
- Incoming call must match one of the two number listed on the application.
- VIP, make sure they know their agents name when calling in.
- 3 way calls our not permitted. If an agent is on the line, the call will be ended.
- Calls our not permitted to be made while the agent is still in the house or at the point of sale.

Existing Guidelines

- **Verification Calls will be made on any application that is over \$2,000 ALP total, including combined ALP with existing policies. (This includes A&H)**
- **Calls are up to the staff discretion, from time to time an application that is under 2,000 alp may be called if needed.**
- **Any applicant that verifies false or omitted information will be cancelled or trialed at the discretion of the Staff.**
- **Auto-Sending will be sent as NOPRD**
- **Staff hours. 9-4 Monday-Friday. 6-8 Monday- Thursday**
- **Outbound call will come from a 330-area code.**
- **Email eapps@ariasagencies.com for specific verification request. Never email a specific staff member directly. They might be off that day. Always email the group.**
- **Please avoid giving exact times to call, we will try our best to accommodate but this will not always be possible. Its best to give windows. For example, call bw 9-11.**
- **Let staff know what the best number is to call.**
- **Its always great to leave notes in the queue, but for a prompt response, or time sensitive matters, make sure to always email the staff as well.**

Verification Exclusion

To have your application be excluded from verification calls you must meet all three guidelines below.

- **Be with the agency for 13 mths.**
- **80% or higher 4 mth**
- **70% or higher 13 mth retention.**

TEAM,

We have a very exciting announcement. There will be a dedicated 1-800 line for applicants to call in to have their applications verified. These calls are received by the agency staff, NOT HOME OFFICE VERIFICATION CALLS. Please review the guidelines below on how to effectively use this new tool, along with a refresher on our current system and processes.
If anyone has any questions, please reach out to me directly.

NEW

- **888-227-1650 - This number can be given to clients to call in.**
 - **THIS LINE IS STRICTLY FOR INTERNAL VERIFICATION CALLS ONLY, WHICH MEANS THIS HAS NOTHING TO DO WITH HOME OFFICE, OR UW.**
 - **HOURS – 9 am to 5 pm EST, Monday through Friday. Excluding holidays.**
 - **We will try our best to answer every call, but this will not always be possible. If they need to leave a message, please make sure they let us know their name, agent's name, and best time to call.**
 - **Incoming calls must match one of the two numbers listed on the application.**
 - **VIP, make sure they know their agent's name when calling in.**
 - **3-way calls are not permitted. If an agent is on the line, the call will be ended.**
 - **Calls are not permitted to be made while the agent is still in the house or at the point of sale.**
 - **If we feel these guidelines are abused, the policy will be sent with a NOPRD and your team may no longer be allowed to use this call line.**
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1. **Agents aren't permitted to use this line. It is for applicant only. We won't take the call if it's from the agents line.**
 2. **Repeat calls, don't have them call back multiple times over a few minutes span. They need to leave a vmail.**
 3. **VOICEMAILS - VIP, they need to leave their name, number, and agent's name.**
 4. **Don't have the applicant call before the application is loaded in the Que. We can't verify what we don't have.**
 5. **APPLICANTS DON'T KNOW THEIR AGENTS' NAME. That's how we search, but also that just isn't a good practice in general.**