Impact Mobile and Desktop

Table of Contents

1. Welcome

This user guide is for Impact Mobile and Impact Desktop.

For access to Impact Desktop you must go to Impact Portal. To access the Portal use this URL https://impact.ailife.com

For access to Impact Mobile use the URL
https://impactmobile.ailife.com
You can Not access mobile from the portal.

Best Practices when accessing Impact Mobile and Desktop

Do not use the links in a Impact Search from a browser
Do not use an old bookmark
Do not add anything after the '.com'
Use Google Chrome

If you can NOT log into Impact, follow these steps
1. clear your cache Watch video here
2. reset your password
3. contact your local admin and ensure you are on the active agent list and confirm your correct username
4. contact impacthelp@ailife.com Click here for The Best Practices for Tech Support

Google Chrome is the preferred browser for Impact
Download Google Chrome Here

NON-Agent Proxy's or Admins canNOT access Impact Mobile or Desktop

What is in the Impact Portal - https://impact.ailife.com

Impact Desktop: Agents, Manager's, and SGA's
Agent Workspace: Agents, Manager's, Proxy's/Admin's and SGA's
Impact Manage: Managers, Proxy's/Admin's and SGA's
Impact Admin: SGA's and Proxy's/Admin's Only
Reports: Agent's, Manager's, Proxy's/Admin's and SGA's

2. What is Impact

Impact is a Website hosted Customer Relationship Management tool for American Income and National Income Agent and Managers.

Impact Mobile and Desktop will provide the following:

- Leads and Resources
- Current News and Events (Desktop only)
- Conservation Items (Mobile Only)
- Data and Stats
- Your Schedule (Historical schedule Desktop only)
- Access to the agents data assigned to you
-
- Getting started with your technology - Watch video here

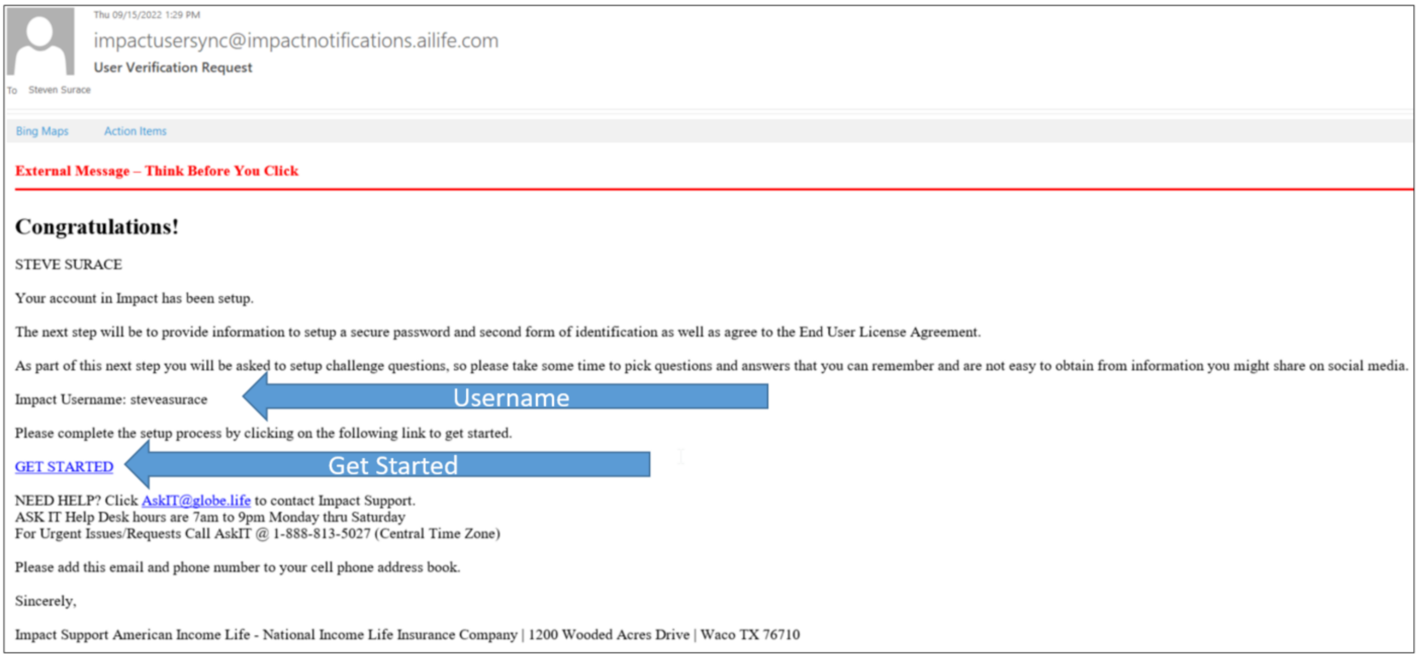
2.1. How to Set Up Impact

When you are issued your agent number by the licensing department You can NOT set up Impact or AWS/eApp until the next business day. Your local admin/SGA will email you an Impact on boarding email. This will come in 2 parts. Part number one, the Congratulations email from the Impact Notifications and the second from your office admin, this will include your Agency Key
sometimes referred to as a Secret key. Note: the Secret key letters are case sensitive.

IT IS HIGHLY RECOMMENDED YOU DO NOT SET UP AWS

UNTIL YOU SET UP IMPACT FIRST. USE THE USERNAME PROVIDED AND EMAIL THAT YOU USE IN IMPACT TO SET UP AWS. This will ensure you have 1 user name and 1 password for both sites moving forward. You will receive your new agent number email prior to receiving your Impact on boarding email. If you do NOT receive your Impact On boarding email on the following business day, please reach out to your local admin for your Impact on boarding email, that way you can set up Impact First.

When you receive your Impact Congratulations email it will include 2 very important items. 1. Your Impact user name. 2. The 'GET STARTED' Link


Thu 09/15/2022 1:29 PM
impactusersync@impactnotifications.ailife.com
User Verification Request
To Steven Surace

Bing Maps Action Items

External Message – Think Before You Click

Congratulations!

STEVE SURACE

Your account in Impact has been setup.

The next step will be to provide information to setup a secure password and second form of identification as well as agree to the End User License Agreement.

As part of this next step you will be asked to setup challenge questions, so please take some time to pick questions and answers that you can remember and are not easy to obtain from information you might share on social media.

Impact Username: steveasurace

Please complete the setup process by clicking on the following link to get started.

GET STARTED

NEED HELP? Click AskIT@globe.life to contact Impact Support.
ASK IT Help Desk hours are 7am to 9pm Monday thru Saturday
For Urgent Issues/Requests Call AskIT @ 1-888-813-5027 (Central Time Zone)

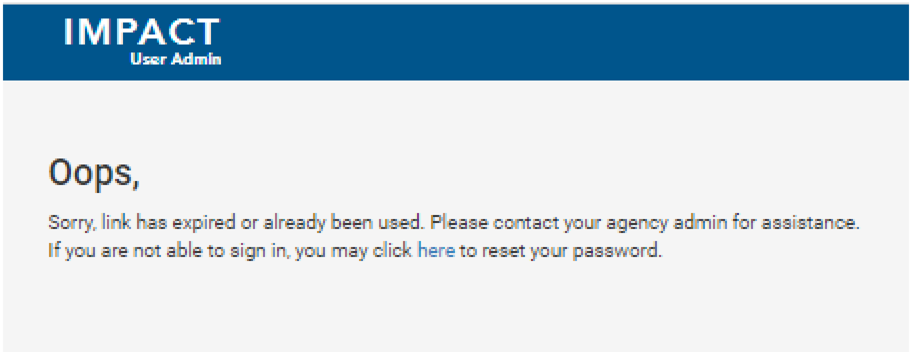
Please add this email and phone number to your cell phone address book.

Sincerely,

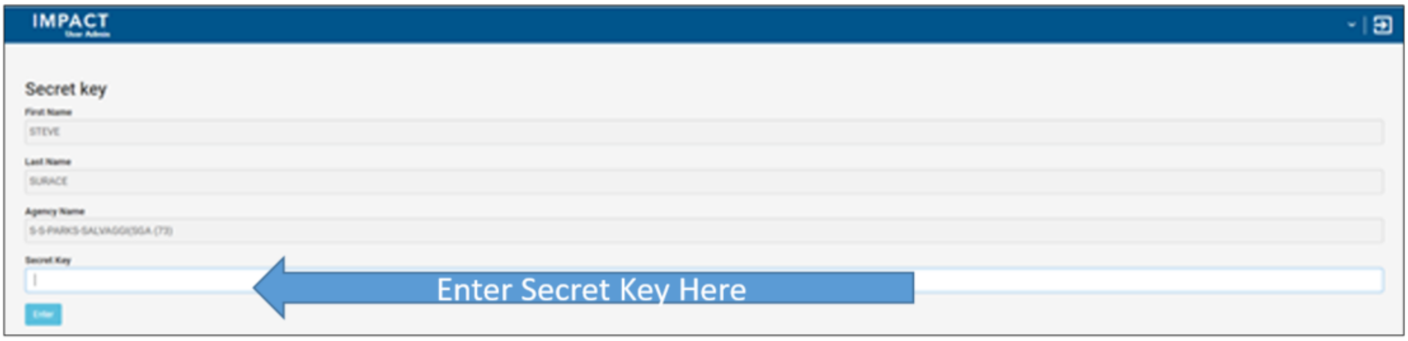
Impact Support American Income Life - National Income Life Insurance Company | 1200 Wooded Acres Drive | Waco TX 76710

To get started, simply select the 'GET STARTED' link.

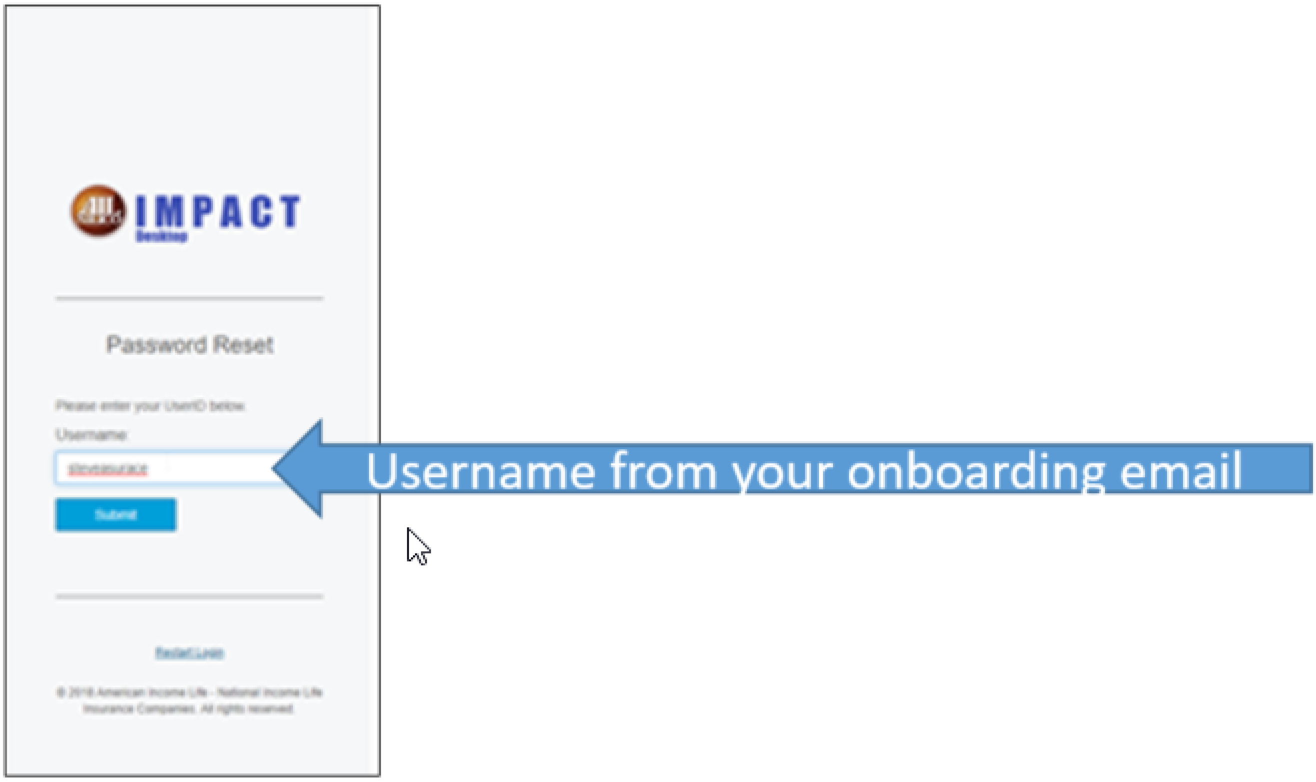
If the 'Oops' screen displays, you must contact your local agency admin to resend the on boarding email. The link is available for only 24 hours.



Enter your Agencies Secret Key (provided in an email from your Local admin)

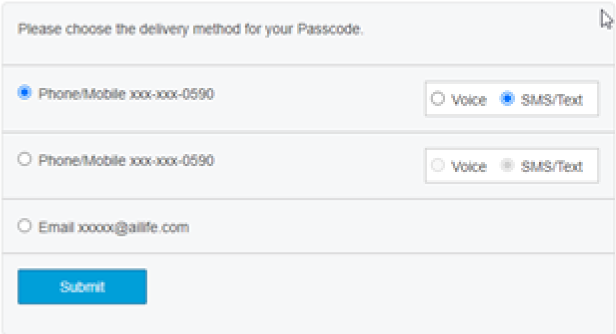


Enter the user name provided in the Congratulations Email

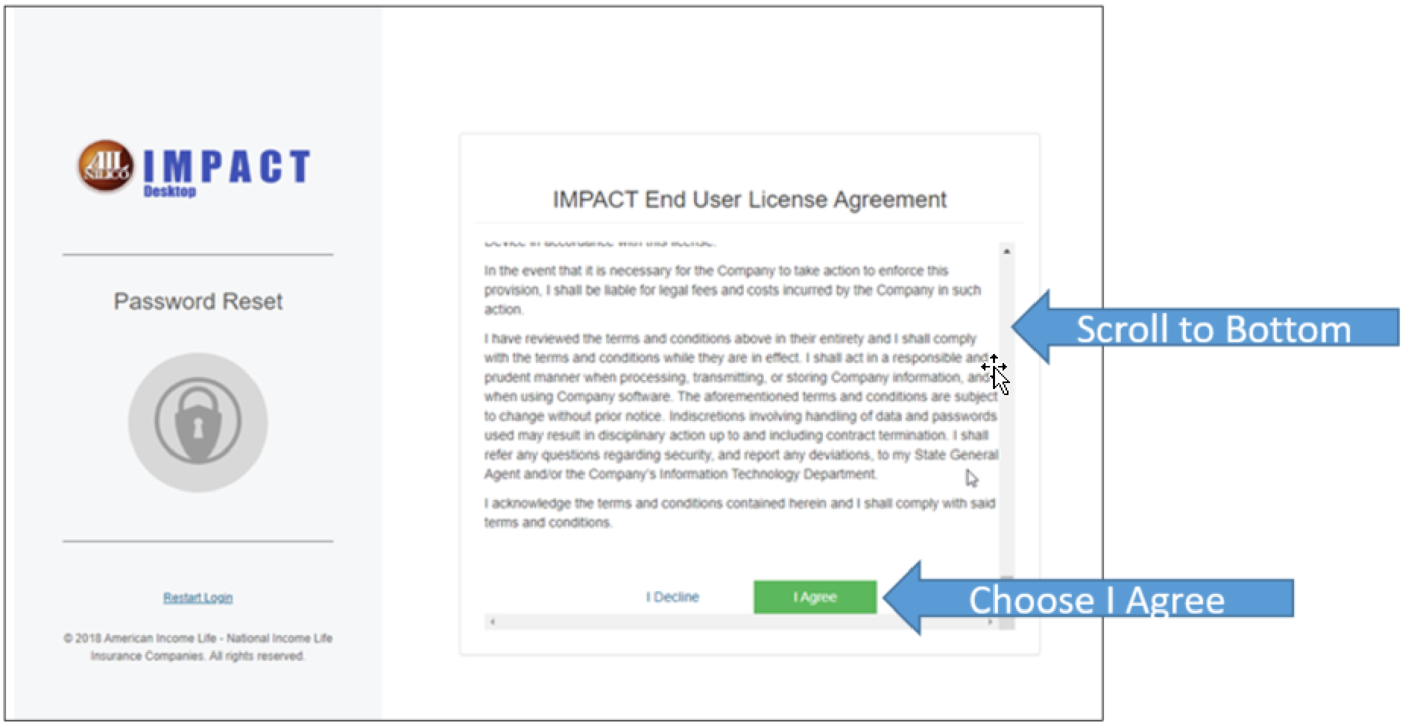


Choose a phone number or email to receive your verification code. If Any one of these fields are not correct.

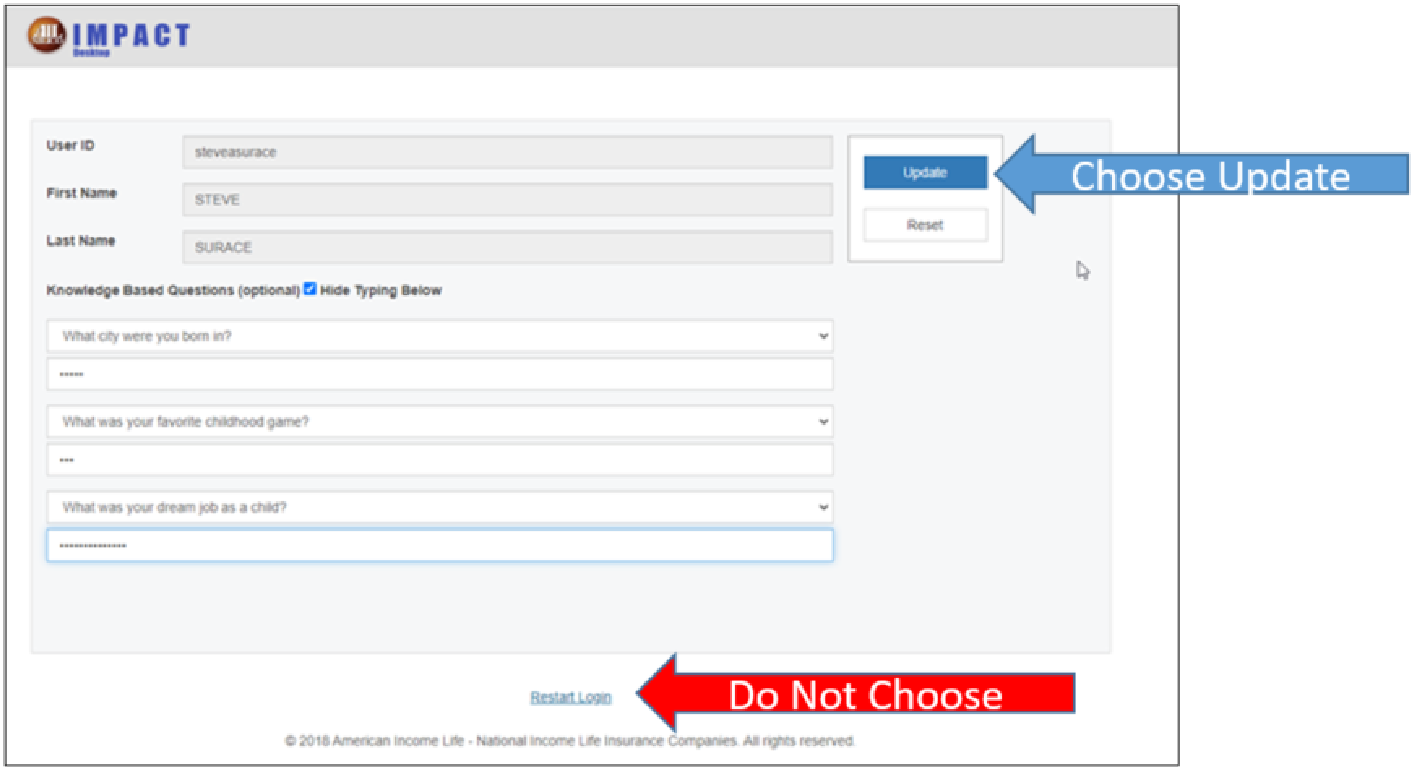
Reach out to your LOCAL admin. They can update these in Impact Admin.



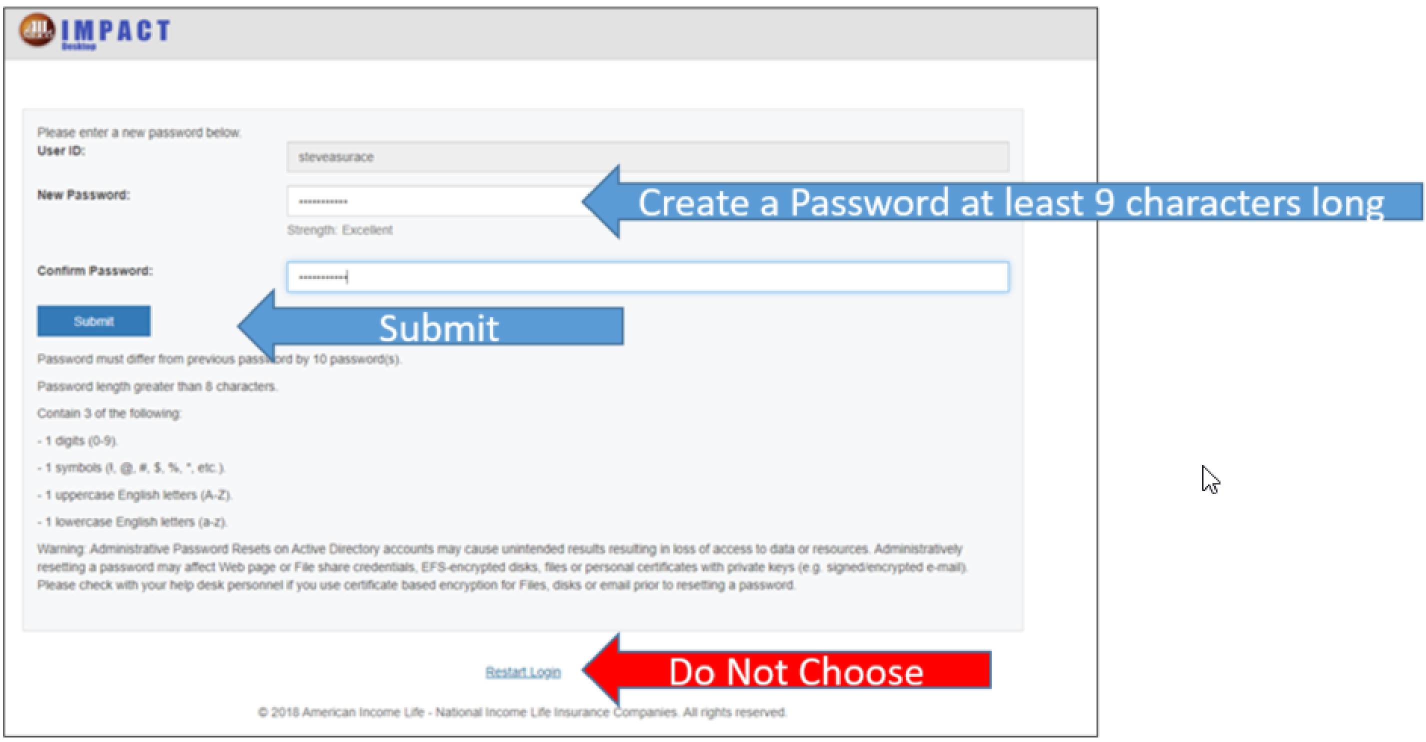
Scroll to the Bottom of the End User License Agreement and after you have reviewed, choose I Agree



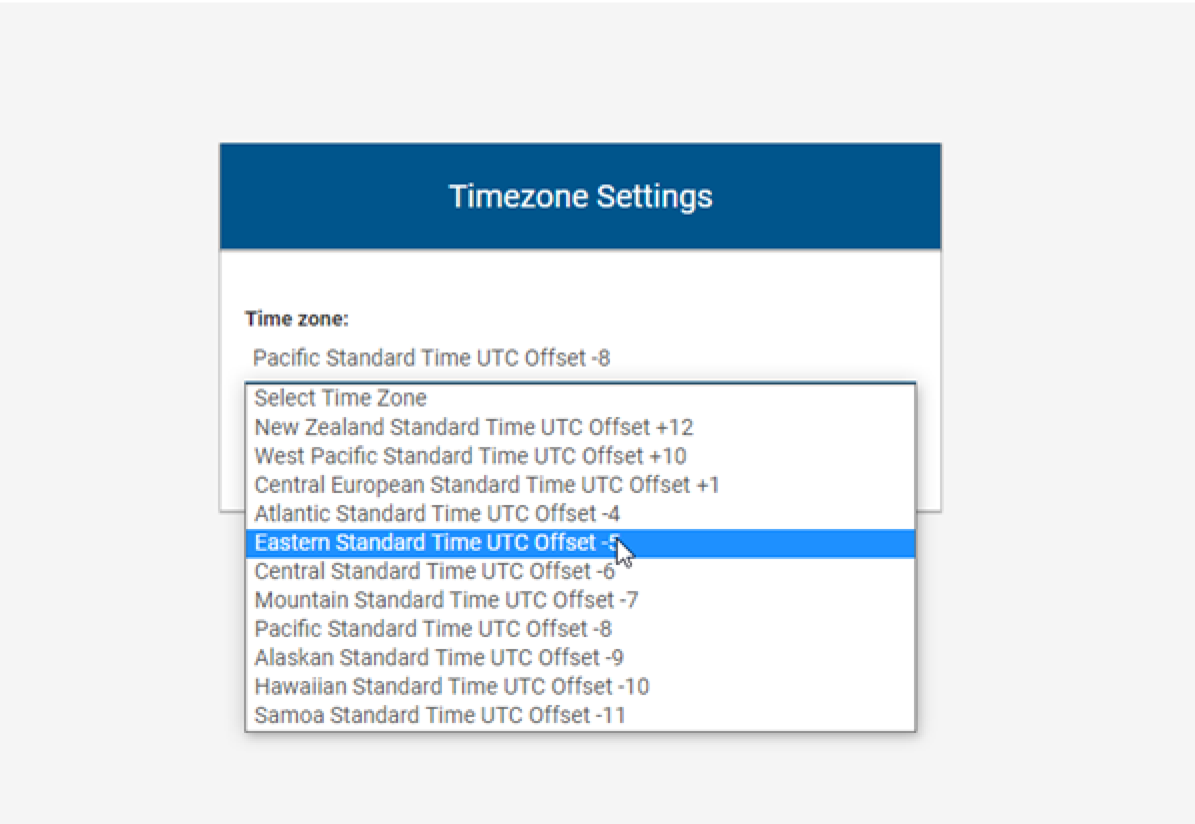
Enter your 3 Knowledge Based Question Answers and choose 'Update'. Do NOT choose Restart login or Reset.



Select a Password and Confirm it. Your Password must follow the instructions included. Ensure it is at lead 9 Characters in length.



Wait until you are on Impact Desktop, then change or confirm your Timezone Settings. Select the Down arrow in the top right corner next to your name to select time zone setting and ensure your on the correct time zone.



Next go to Impact Mobile (https://impactmobile.ailife.com) and update your Impact Preferences in the update links section under the Sub Menu (Three Bars).

View how to set up your Update Links Here

2.2. Impact Frequently Asked Questions

This is a list of Frequently Asked Questions. To locate your issue, it may be best practice to search the page using CTR-F and search by key words.

Best Practices for Technical Support Document

How to handle an Impact Issue properly Video

How to set appointments in different time zones using Impact Mobile

How to properly clear your cache

What is a reserve lead or reserve agent

2.3. Contacting the Impact Help Desk

Help Contacts:

Best Practices for Technical Support

How to properly clear your cache (Video)

eApp Help
Email: eapphelp@ailife.com
Phone: 888-804-9823
Hours: Monday - Friday 8am-5pm Central Time

When leaving voice message or email please supply Help Request # if one has been assigned or, provide all of the information listed below.

1. Agent number you selected in the Initial Application Package Information screen.
2. State you selected in the Initial Application Package screen.
3. Phone # with Area Code and/or extensions.
4. Brief description of assistance

Please be sure to include all 4 items above to avoid call back delays. Omission of any of the above requested information will delay processing of your Help Request.

Impact Help

Email: impacthelp@ailife.com
Phone: 888-804-9823
Hours: Monday - Friday 7am-9pm CST Saturday 8am-4:30 CST

Prior to contacting Impact help
1. clear your cache
2. reset your password
3. contact your admin to ensure your are on the active list and you are using the correct user name.

AWS Help

Email: cashelp1@ailife.com
Phone: 254-761-6684
Hours: Monday - Friday 8am-5pm Central Time

ICM Help

Email: icmquestions@ailife.com
Phone: N/A
Hours of operation: 8 – 5 M-F, Central Time

Licensing/Hierarchy Help:

Email: agency@ailife.com (SGA or Admin use only)

Each SGA is assigned their own clerk and manager

AILplus Help
Email: ailplus@ailife.com

Child Safe Mobile App
Email: skamran@globe.life
Please include your Name, SGA Name, Cell Phone Number, Agent Number

For questions regarding Advance, please contact AAMoney@ailife.com
For questions regarding Bonus, please contact BonusQuestions@ailife.com
For questions regarding Renewals, please contact AgentAccounts@ailife.com
For questions regarding ICM Web Reports or access to the ICM Web Portal, please contact ICMQuestions@ailife.com

Select this link for the Top Home Office Contacts

When Sending a Help Ticket, you must include the following:
Name:
SGA(s)/Agency Owner Name: (verify this with your manager, many times agents put their direct manager and not the SGA/Agency Owners name)
Contact Phone Number:
Agent Number:
Detail description of issues to include:

Screen shots or zoom screen share video of issue if applicable:
To record your screen in zoom.

Start a zoom meeting

Share Screen

Record to cloud (if you record to your computer, due to the size of the recording, you must upload to Google drive and then send the link to Google drive)

demonstrate the issue and verbally explain the problem

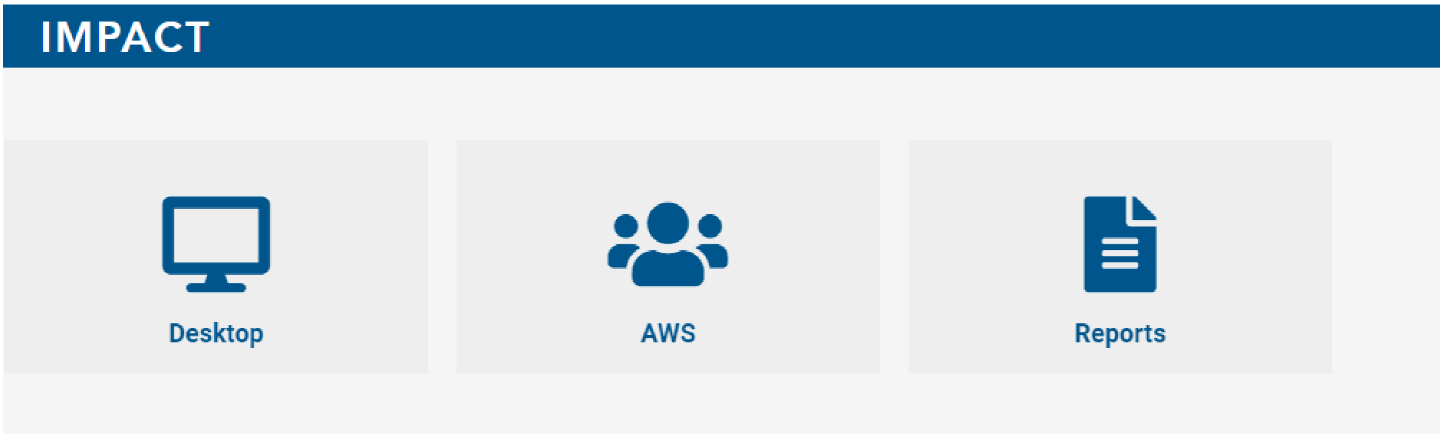
End the Zoom Meeting to receive the link in your email

Share the link with the help desk

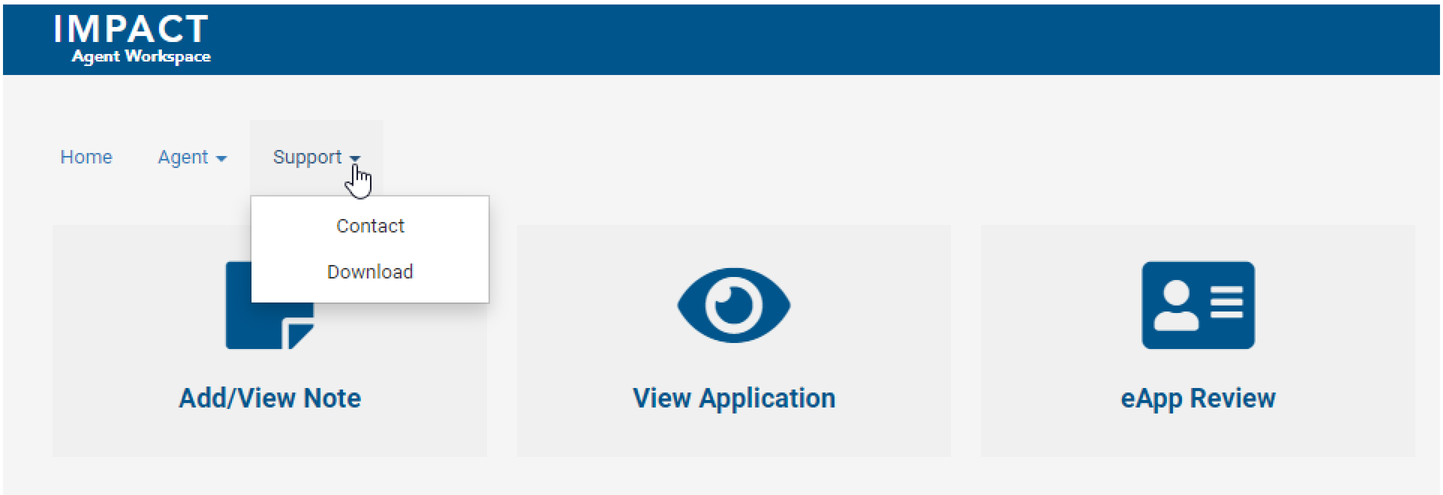
What if anything you have done to correct the issue?

2.4. eApp Set Up

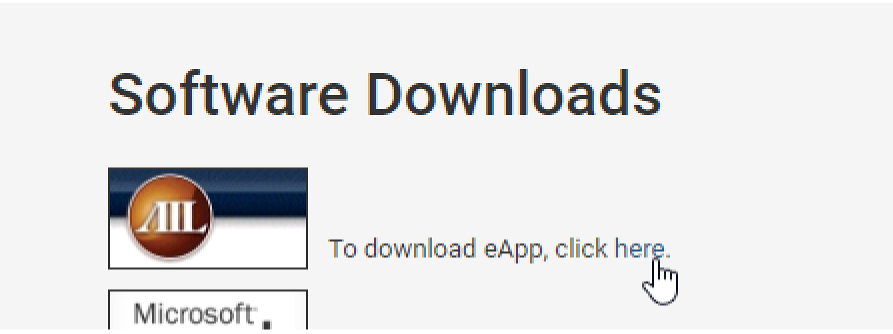
Installing eApp - 24 hours after you have set up Impact and AWS, when you access the Impact portal the AWS Tile will appear. Select AWS from https://impact.ailife.com Watch eApp install video here



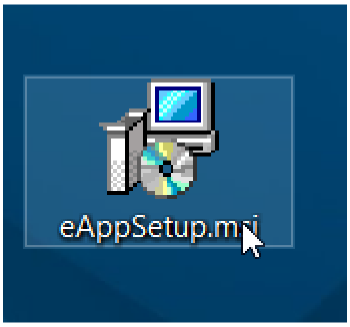
Select the Support Option and then Download Option



Select the word her next to download eApp



Locate the file eAppSetup.msi in your download folder and select to install



Install and Open the file

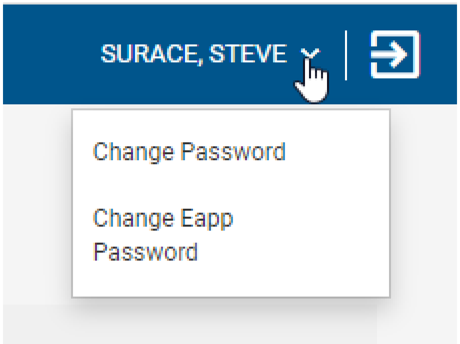
User name for practice is eapptraining   Password is training

If you set up AWS you would use your AWS user name and password. To verify your user name or update your password for eApp.

1. go to the Impact Portal https://impact.ailife.com

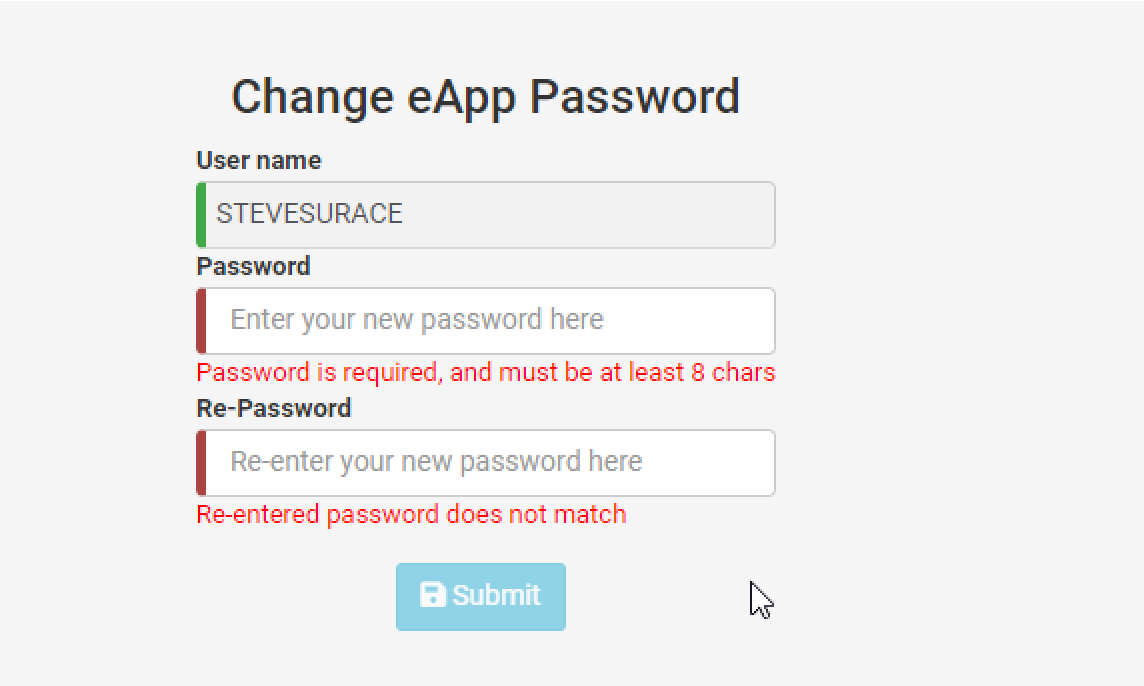
2. Select AWS Tile

3. Select the drop down menu near your name in the top right corner of the screen



4. Select Change eApp Password

5. From here you can verify your user name and update your eApp password.   (Note: your eapp user name and Impact User name is not always the same. To locate your Impact user name you can contact your local admin office).



for additional eapp help contact eapphelp@ailife.com

2.4.1. Minimum Laptop Requirements for eApp Install

Minimum Requirements for eApp Computers: (how to check these items instructions are below)

- Windows 8.1 or later operating system
- 1 GHz processor CPU: Intel Core i3, AMD Ryzen 3, or equivalents
- 4 GB of RAM MINIMUM; 8 GB RECOMMENDED
- 16 GB of available disk space
- DirectX 9 graphics device with WDDM 1.0 or higher driver
- Microsoft .NET Framework version 4.6 or higher
- Virus Scanning Software

The eApp software was designed to function on laptop PC's.

Can you run eApp on a MAC?

YES (Read below)

In order to accomplish this, you would need to contact a local Certified IT Technician and ask about a virtualization software.

Let the tech know that you are trying to run a Windows-based application and you need virtualization software installed on your MAC.

NOTE: AIL/NIL IT will not be able to provide technical support for eApps running on Macbooks.

To check your basic computer specs in Windows 10
Select the Windows start button
then click on the gear icon for Settings
In the Windows Settings menu, select System
Scroll down and select About
From here, you will see specs for your processor, RAM, and other system info

To find available storage or Hard drive space info in Windows 10
Select the Windows start button,
then click on the gear icon for Settings
In the Windows Settings menu, select System
Scroll down and select Storage
From here, you will see specs hard drive free space

2.5. Agent Workspace Set Up

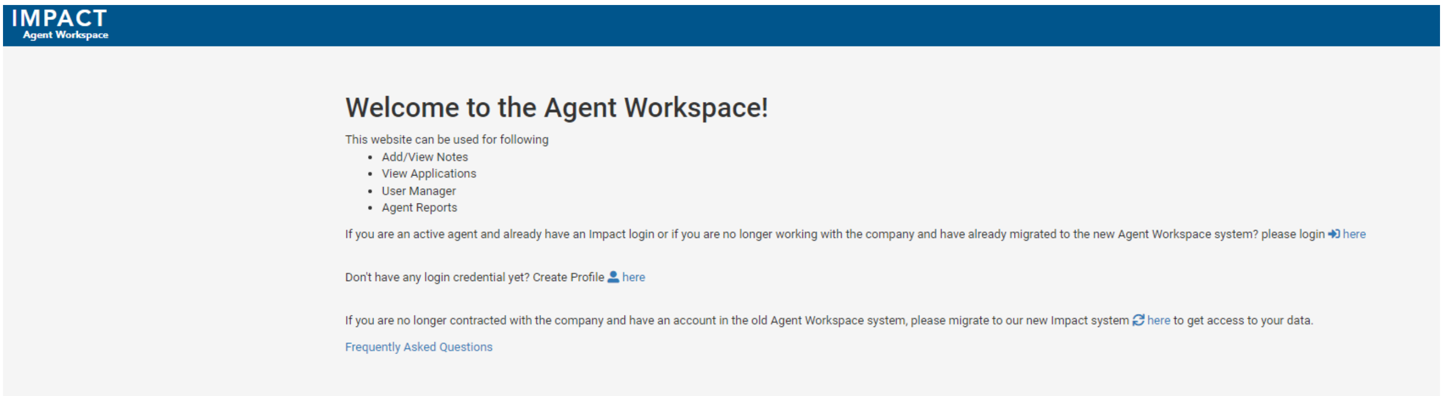
Agent Name: **XXXXXXX**

Pending Agent Number: XX123

Your pending agent number has been issued. It will not be available until **tomorrow**. Please contact your SGA for training on the proper way to list numbers on transmittals and Eapp insurance applications. The instructions and software for installing the laptop presentation can be accessed by using the link listed below.

https://aws.ailife.com/userprofile.aspx

If you have any problems with the installation process, please email the Ask IT desk at askit@globe.life



3. Impact Mobile

Impact Mobile https://impactmobile.ailife.com   You can Not access mobile from the portal. It is suggested that you do not use the links in a Impact Search from a browser or use an old bookmark.

Impact mobile can be used and viewed from your phone or from your computer.   Impact mobile is used the most out of all the Impact platforms.

Impact Mobile is where an agent can do the following:

View and Call Leads
View and Manage Schedule
View and Manage your Conservation and Mods **(only in Mobile)**

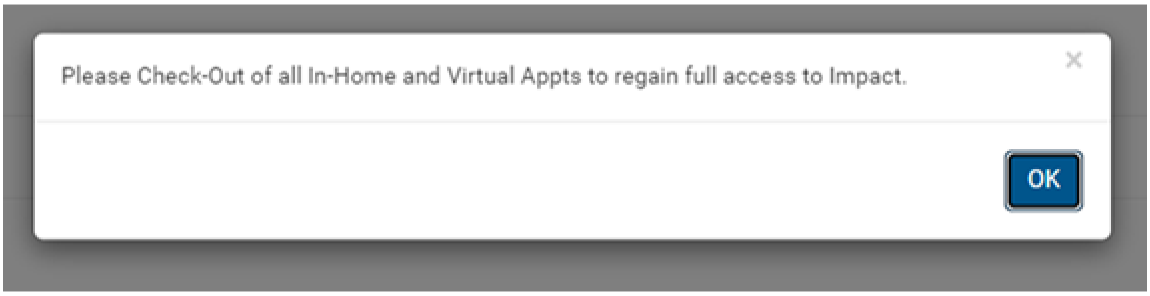
Currently these are the items you can exclusively do in Impact Desktop and your can NOT do in Mobile

View and change your Time zone
View Current news and updates on the Landing Page
View Historical schedules
Print multiple letters at the same time

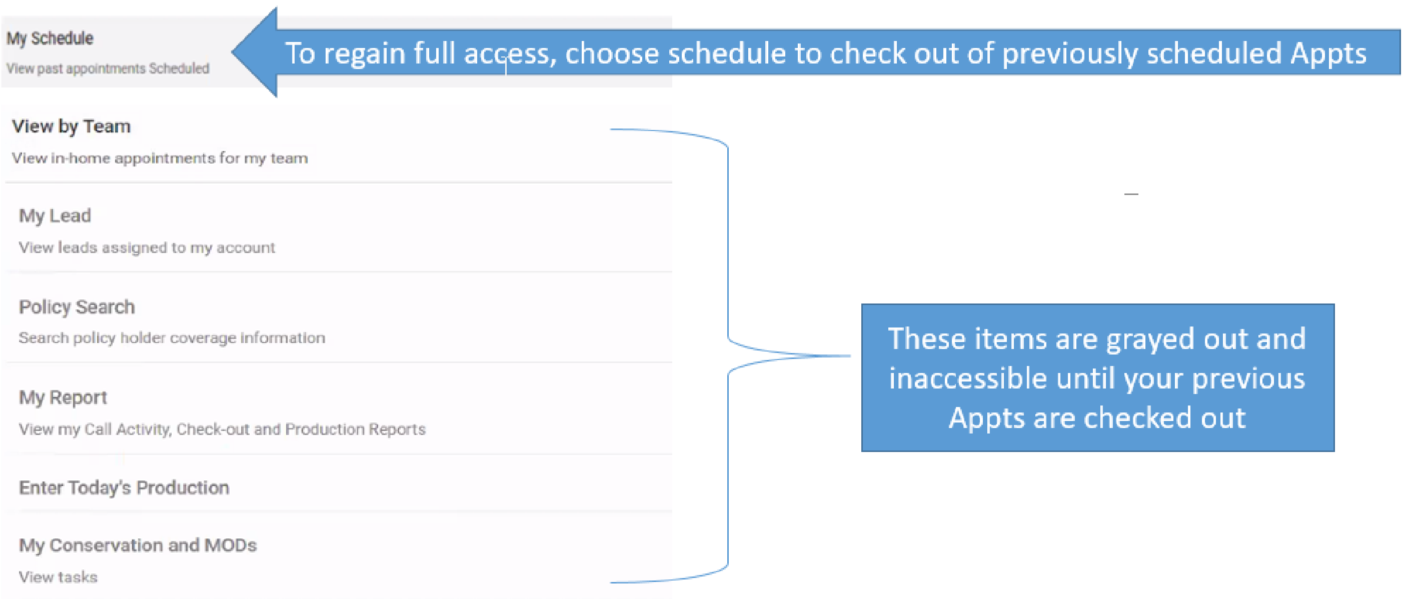
3.1. Mandatory Checkout

Impact Mobile Requires a **Mandatory Check-Out** of all previously scheduled appointments prior to regaining full access to Impact Mobile.   It is always best practice to check out of your scheduled appointment at the time of your scheduled appointment.

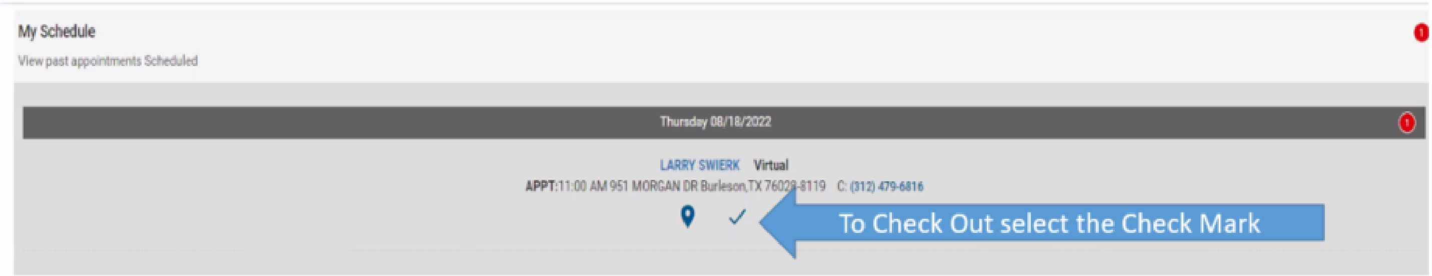
***** BUG ALERT (This will be corrected in 2023 with a future update)****if an appointment was rescheduled for a future time and date or scheduled for a future call back after the original scheduled time, the appointment will stay in your schedule and will duplicate to the scheduled future time. This causes a Mandatory check out on the next day. You should just reschedule for the desired appointment or call back time scheduled originally.



Open My Schedule to resolve your previously scheduled appointment. The other menu options will be grayed out and you will not have access until you resolve your previously scheduled appointment.



Check out with the correct resolution. Once this has been completed, you will regain full access to Impact Mobile

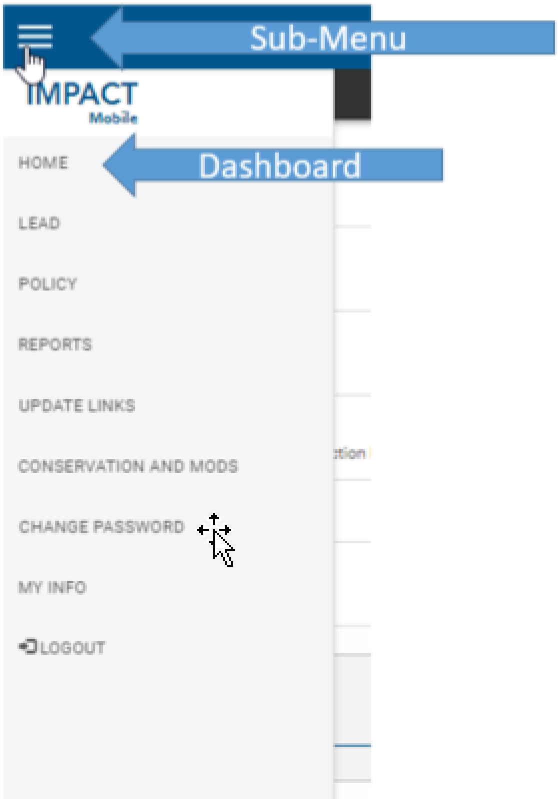


3.2. Sub-Menu- 3 Bars

There are 2 Menus in Impact Mobile

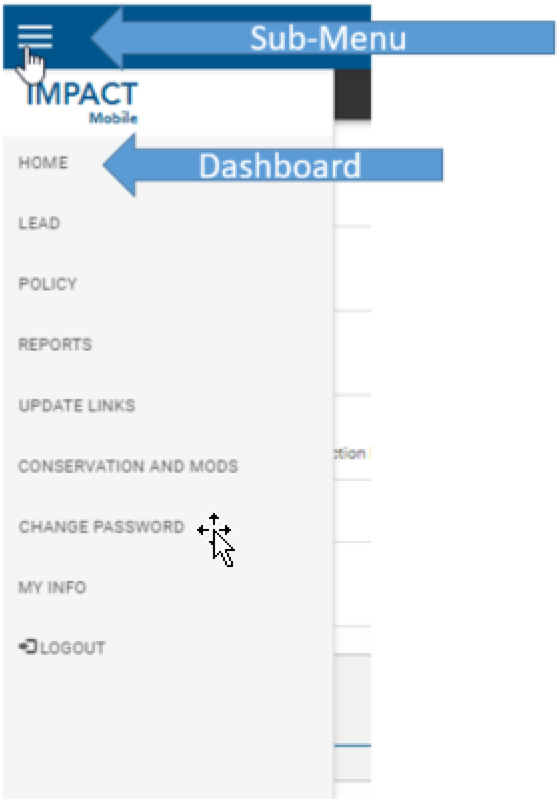
1. The **Sub Menu** where you can access by selecting the Three bars in the top left corner

2. The **Dashboard** which is the default menu. This is accessible by using the Home Button in the Sub-menu.

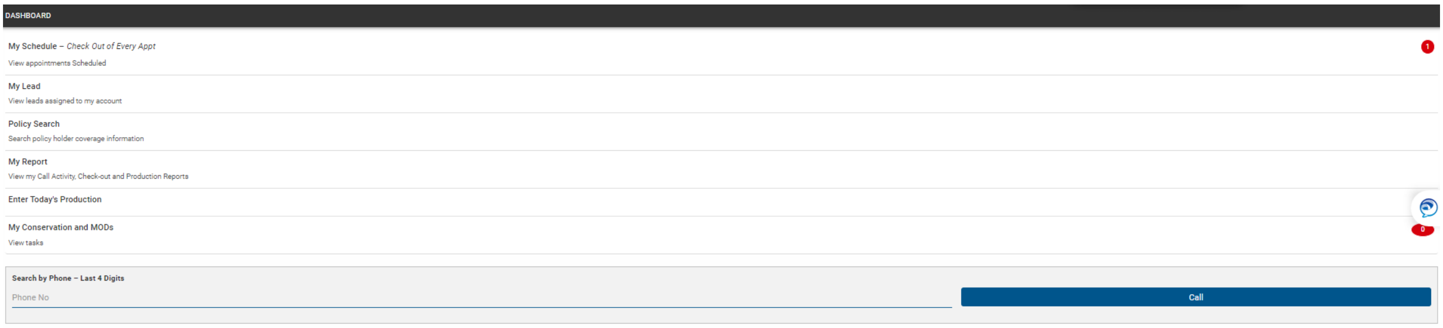


3.2.1. Home

This Home button takes you back to the Dashboard View.

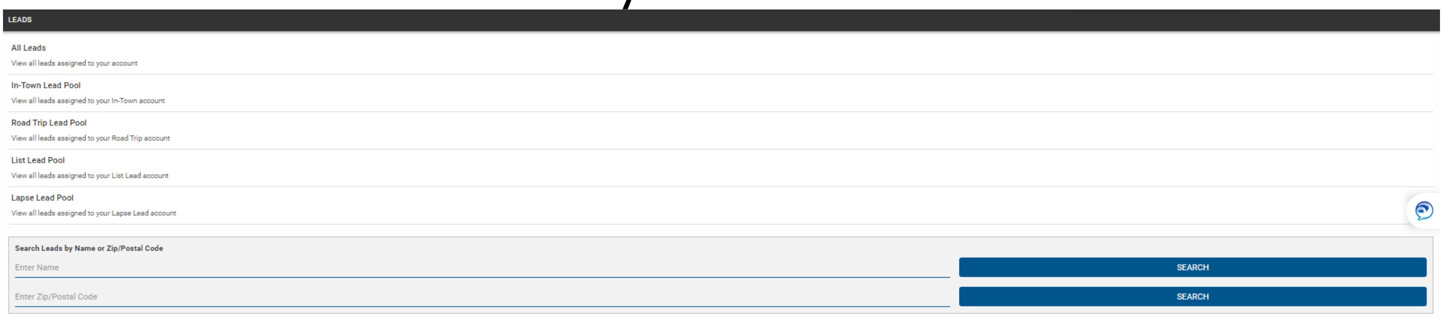


This is the Dashboard Menu



3.2.2. Lead

The Lead button will take you to the Leads Section.



From here you can access your leads and view any leads assigned to your assigned team. You can also navigate directly to one of the 4 Lead Pools. A lead pool is a virtual folder that can be utilized to sort your leads from your SGA or Agency Lead Administrator.

Even though the 4 folders are named, your agency can utilize them however they see fit.

All referrals collected from eApp will automatically distribute to the In-Town Lead Pool. When an agent performs an On line Update in eApp, the referrals will process through the combined feature and also a address and phone number append. Due to these processes it may take 30-60 minutes for the referral to appear in Impact after the eApp On line update.

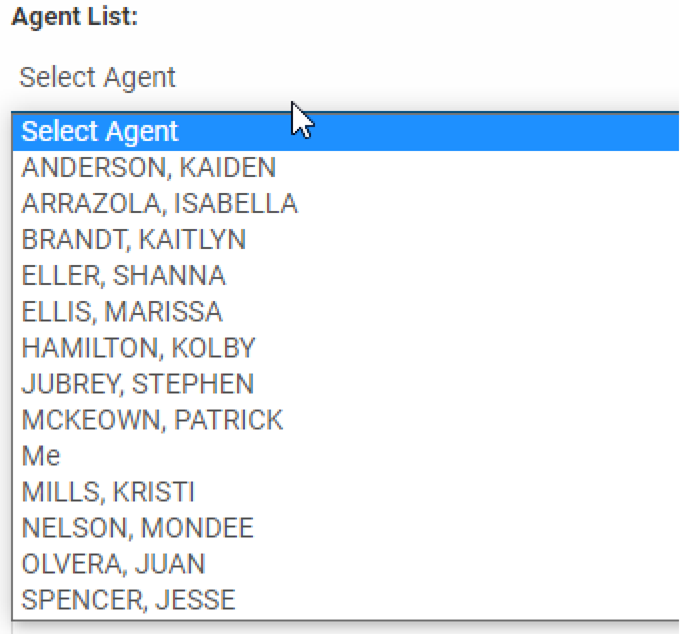
From the Main Lead Screen you can search for a lead in all lead pools by Name or Zip Code.

3.2.2.1. Lead Inbox

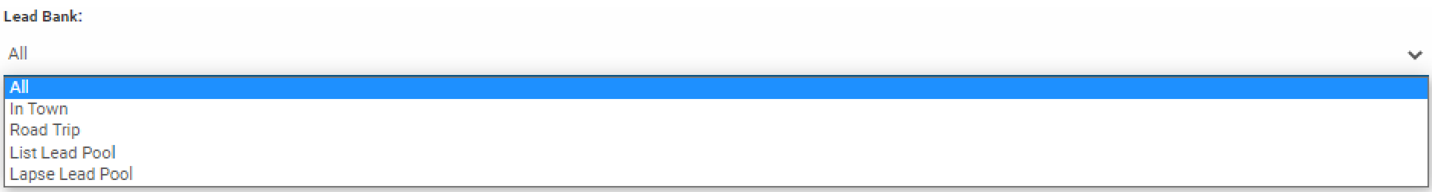
Lead In-box- the lead in-box is where you can locate your assigned leads. From here you can sort and filter by many options. You can also view your assigned agents leads as well. From this screen when you select a lead, you will access the lead Detail call screen.

Filter Options: (Filter means to only show the selected criteria)

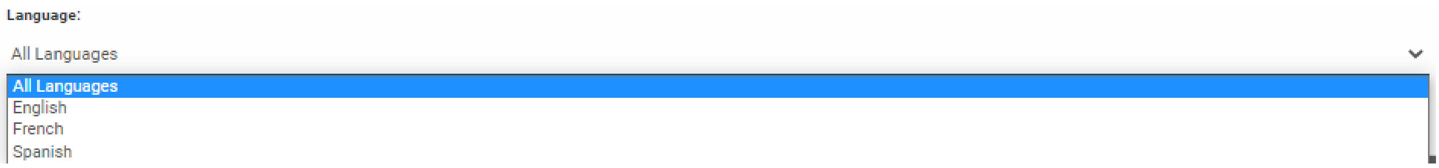
Agent List: This is where you can view your assigned agents and their assigned leads. (if Select Agent is selected, no resources will show)



Lead Bank: This is where you can isolate your leads base on the pool they were assigned to by your SGA or SGA Lead Administrator. Note: even though the pools are named, these can be used at your SGA's discretion. All referrals that the agent collected from eApp will be distributed automatically to the In Town Pool.



Language: This is where you can filter by the clients primary language. If the client has indicated a primary language on the original response or if the lead was previously assigned to an agent that could not communicate with the client do to the language barrier, the agent can change the language and then the SGA or lead admin can reassign to an agent that can speak the clients desired language. Currently we have 3 language choices, English, French and Spanish. If your client speaks another language and you cannot communicate with the client, we would recommend resolving as a miscellaneous lead and note the language the clients speaks.



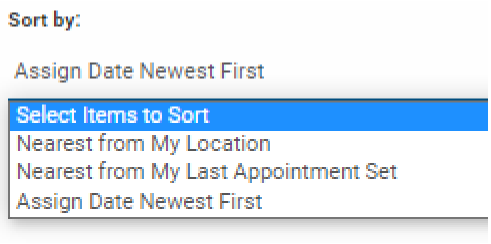
Sort Options- this option organizes lead in a particular order allowing for information to be found easier. This does NOT exclude data.

Sort by:

Assign Date Newest First: This will bring the leads that were assigned to you the most recently by your SGA or SGA Admin.

Nearest from my Location: This will sort by and bring the lead that is closest to your physical location to the top of the list. This is best used when you are actually in the field and NOT virtual. Your location services on your phone will need to be turned on for this to work properly. Note: the lead must be properly geocoded for this feature to work.

Nearest from my last appointment set: This will use the address of the most recent set appointment and bring the lead that is closest to it to the top of your lead list. This is best used when you are actually in the field and not virtual. This will help make your drive most efficient and help limit the miles between each appointment. Note: the lead must be properly geocoded for this feature to work.

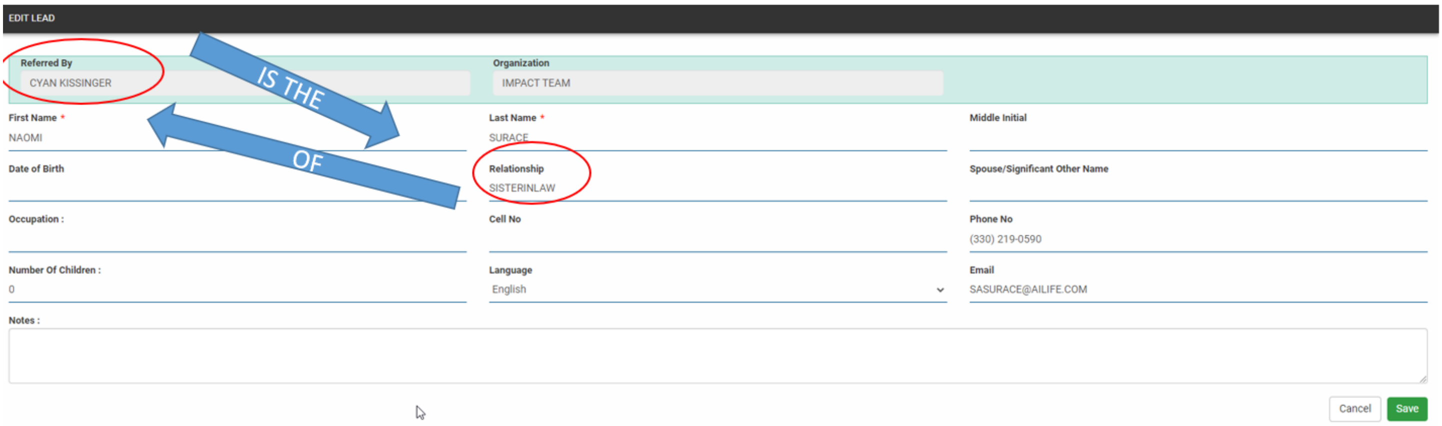


You can also use the Filter Arrows in the top row to arrange your leads by by city in:
City- Alphabetical order or Reverse alpha order
Zip Code- Numerical or reverse numerical order
Lead Type - (Response Card, Referral, POS, Lapse POS, List Lead)

3.2.2.1.1. Add Lead

From the Lead In-box - you can choose the Green Add Lead button. It is always preferred that all referrals are added in eApp, but when necessary you can add a lead from the lead in-box. All leads added from eApp are processed through a phone number/address update software prior to entering your lead inventory. This process does NOT happen if you add from Impact. Also if you add a referral from Impact, this data is NOT collected as a referral collected in Qlikview.

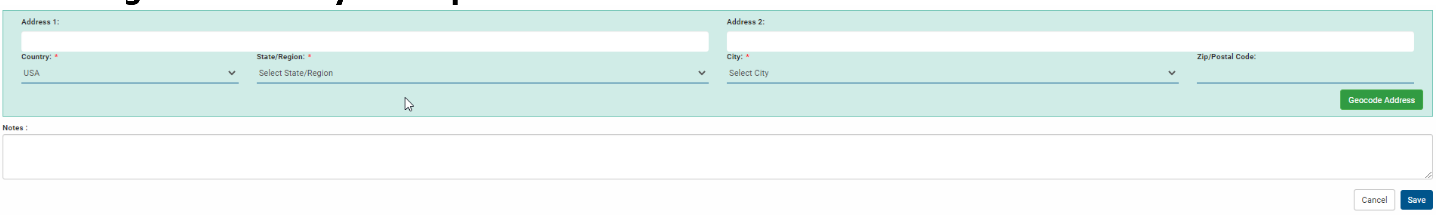
Hi NAOMI,
Your mother CYAN KISSINGER sponsored you for some No Cost benefits provided through American Income Life. I'd like to set a time to review these benefits as they requested and I'm available today. What's your availability when you get home from work? Thank you, Steve Surace Contact me at 330-219-0590



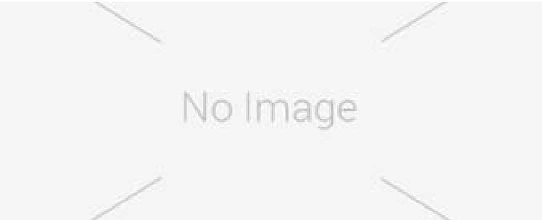
The relationship Field is the Relationship of the Referred by's relationship to the referral. For example: (Referred by) is the (Relationship) to (First Name) of Sponsor.

When a lead is added it may take up to 30-90 minutes to appear in your inventory. Prior to entering your lead inventory, the added lead must process through the combined feature first. **A lead added from Impact does NOT go through the address/phone number append software program. Best practices would be to add the lead in eApp then do an on line update so the lead runs through he address and phone append software and the referral is added to your Qlikview data. Also the image is more accurate.**

If the address is known, you should geocode the address which will allow the lead to be mapped and navigated to from your Impact.

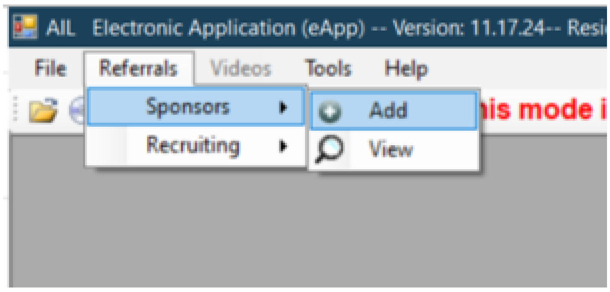


When adding a lead from Impact the Image from the Lead Detail screen will display 'No Image'.



When a lead is added from eApp, Qlikview will collect the data as a referral collected, when an on-line update is performed in eApp, the lead will process through the address/phone number update append software and the image will look like this in Impact:

Note: after an on-line update is performed in eApp, it may take 30-90 minutes for the referral lead to appear in Impact.



Add New Sponsorships

AMERICAN INCOME LIFE
insurance company

Sponsorships

Is the
of

*Agent #	*Referred By	Organization	* Referral Type	* Date
IU961	CYAN KISSINGER	IMPACT TEAM	Internet Surfin' Guide	10/13/2022

Person 1

*First Name: NAOMI
Referral Relationship: SISTER IN LAW
Spouse:
Home #: (330) 219-0590
Cell #:
Address: 150 N CARPENTER
Address2:
*City: BRUNSWICK
*St./Prov.: OH
Zip/Postal Code: 44212
Out Of Area
E-mail: sasurace@ailife.com
Best Time to Call: (•) Morning ( ) Afternoon ( ) Evening
Notes: Nurse with 2 kids

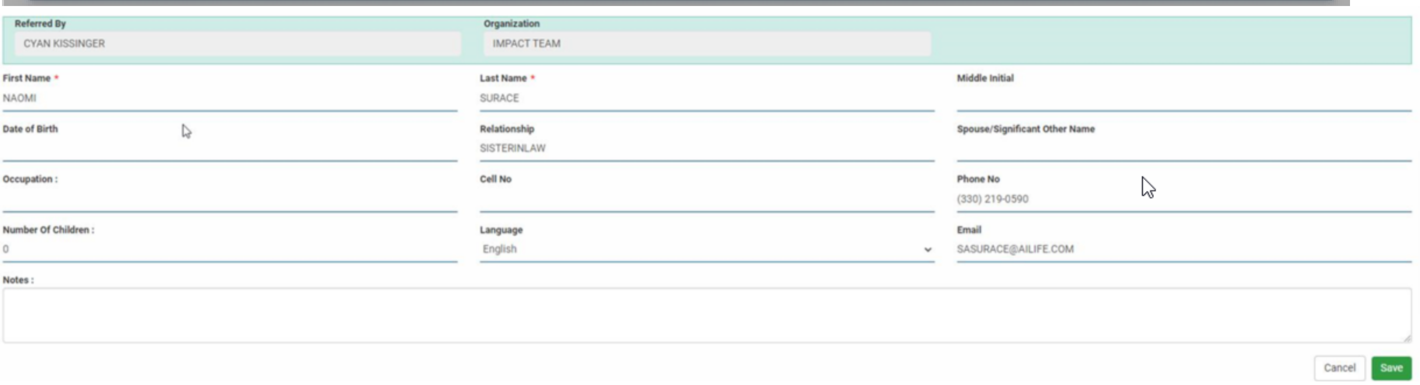
Person 2

*First Name:
*Last Name:
Referral Relationship:
Spouse:
Home #:
Cell #:
Address:
Address2:
*City:
*St./Prov.:
Zip/Postal Code:
Out Of Area
E-mail:
Best Time to Call: ( ) Morning ( ) Afternoon ( ) Evening
Notes:

Add Additional Person

Most individuals sponsor an average of 10 people

Submit



Referred By: CYAN KISSINGER
Organization: IMPACT TEAM

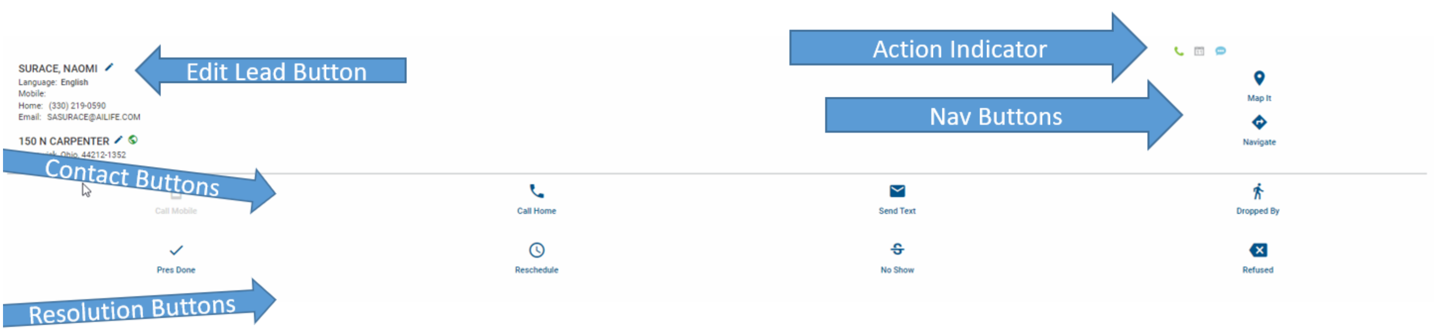
First Name *: NAOMI
Last Name *: SURACE
Middle Initial:
Date of Birth:
Relationship: SISTERINLAW
Spouse/Significant Other Name:
Occupation :
Cell No:
Phone No: (330) 219-0590
Number Of Children : 0
Language: English
Email: SASURACE@AILIFE.COM
Notes :

Cancel
Save

REFERRAL

SURACE		
LAST		DATE OF BIRTH
NAOMI		
FIRST		MIDDLE
150 N CARPENTER		
HOME ADDRESS		
BRUNSWICK	OH	44212
CITY	STATE / PROVINCE	POSTAL CODE
3302190590		
HOME TELEPHONE	CELLULAR PHONE NUMBER	
CYAN KISSINGER	SISTERINLAW	
REFERRED BY	RELATIONSHIP	

3.2.2.1.2. Lead Detail Screen



Edit Lead Button allows you to edit information on the lead. You can edit more fields on a Referral than any other lead.

Action Indicators When these buttons are colored in, it indicates a call has been made, an appointment has been set or a comment has been added.

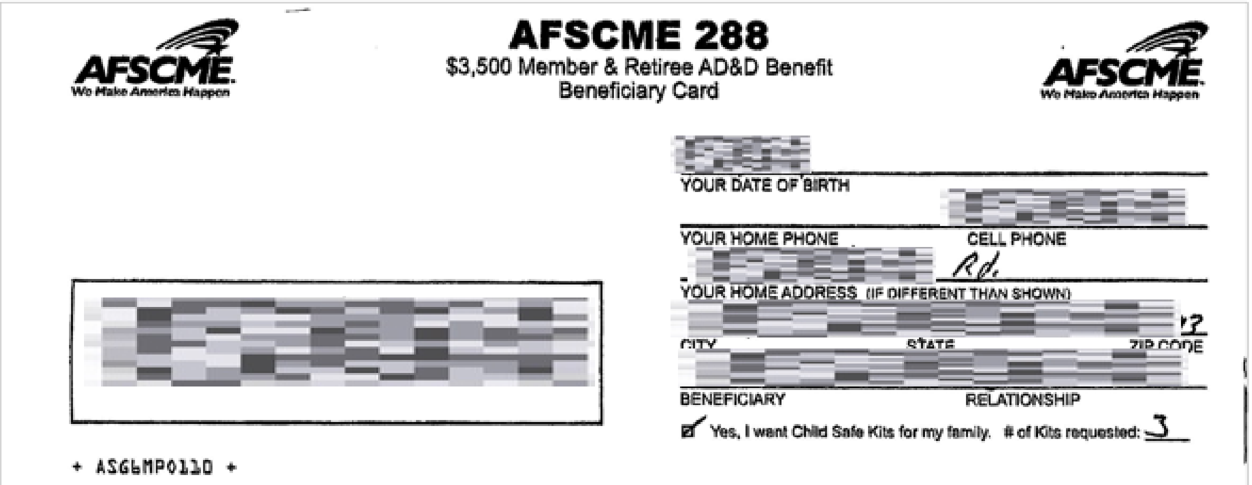
Navigation Buttons allow you to view leads on a map or allows you to navigate from your phone. The Navigation buttons will only be available if the address is Geo Coded indicated by a Green Globe next to the editable address.

Contact Buttons allows you to use your phone app to Call Mobile, Home or text mobile when the numbers are available. When you select these buttons, the what happened, and resolution screens will appear. If the numbers are not available, those buttons will not be accessible. The dropped by button will allow you perform a door knock and allow you account for what happened.

Resolution Buttons These buttons will not be accessible until a contact button is selected. These will allow you to account for the resolution of the scheduled appointment.

The comment section will allow you to view the most recent comment or show more to view previous comments. You can also add a comment in this section.

You can also view the last action taken in the Status section. You will be able to see the most recent until you show more to reveal all actions taken on a lead.



AFSCME We Make America Happen

AFSCME 288

$3,500 Member & Retiree AD&D Benefit
Beneficiary Card

AFSCME We Make America Happen

YOUR DATE OF BIRTH

YOUR HOME PHONE CELL PHONE

Rd.

YOUR HOME ADDRESS (IF DIFFERENT THAN SHOWN)

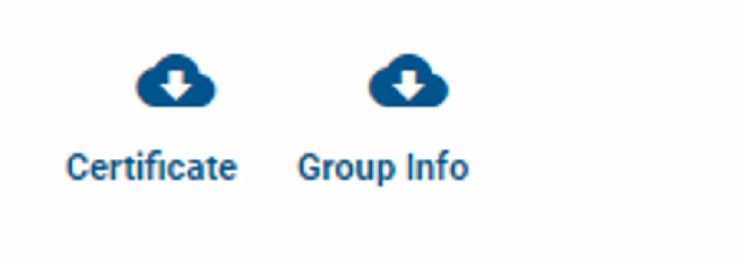
CITY STATE ZIP CODE

BENEFICIARY RELATIONSHIP

☑ Yes, I want Child Safe Kits for my family. # of Kits requested: 3

+ ASG6MP0110 +

Actual Card Returned by the potential Client



Certificate – The AD&D Certificate customized to the lead

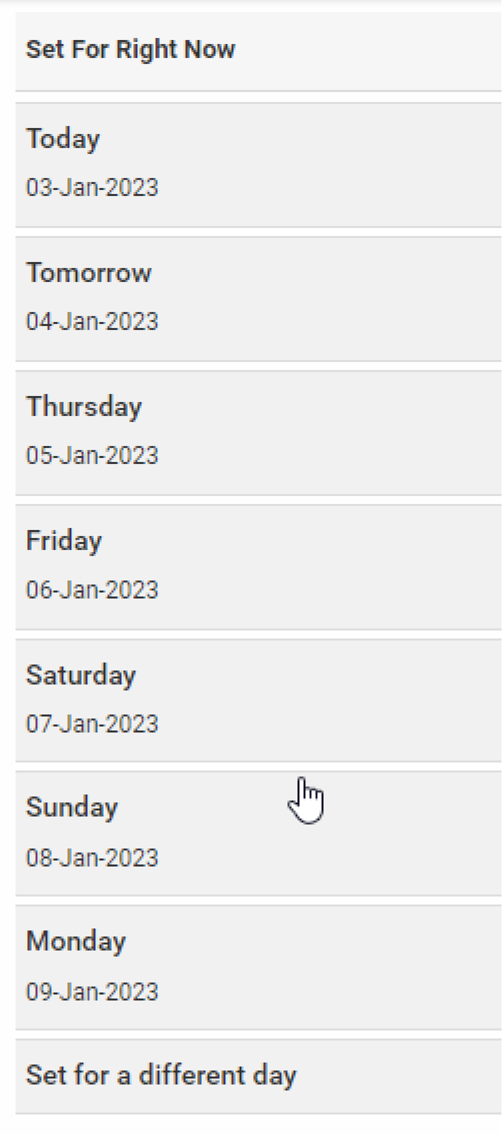
Group Info- The original approach letter in English and Spanish, the Read off letter in English and Spanish, and other lead information. The TG-13A Information sheet is often included on Unions. This will tell you about the companies that belong to the Union, the types of benefits and what happens to them when the members retire.

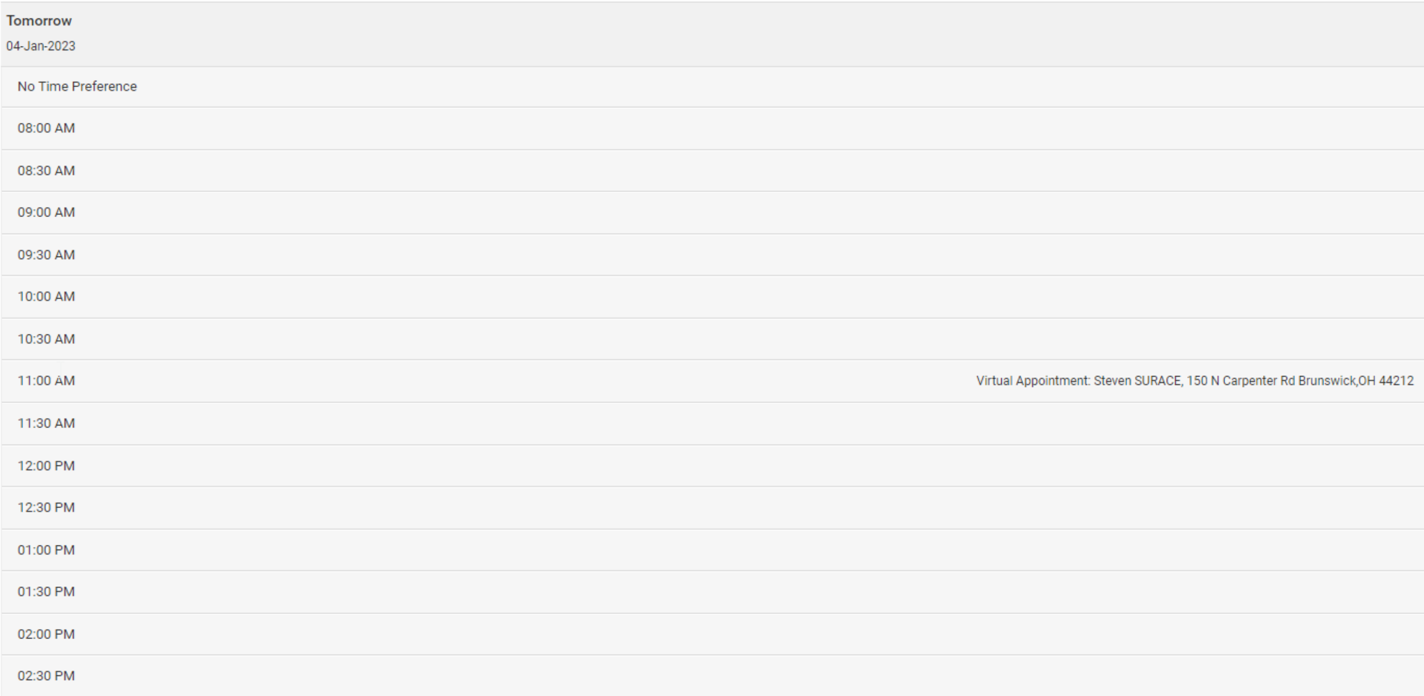
Coming Soon- Vendor lead information and Union President Testimonial Video Links.

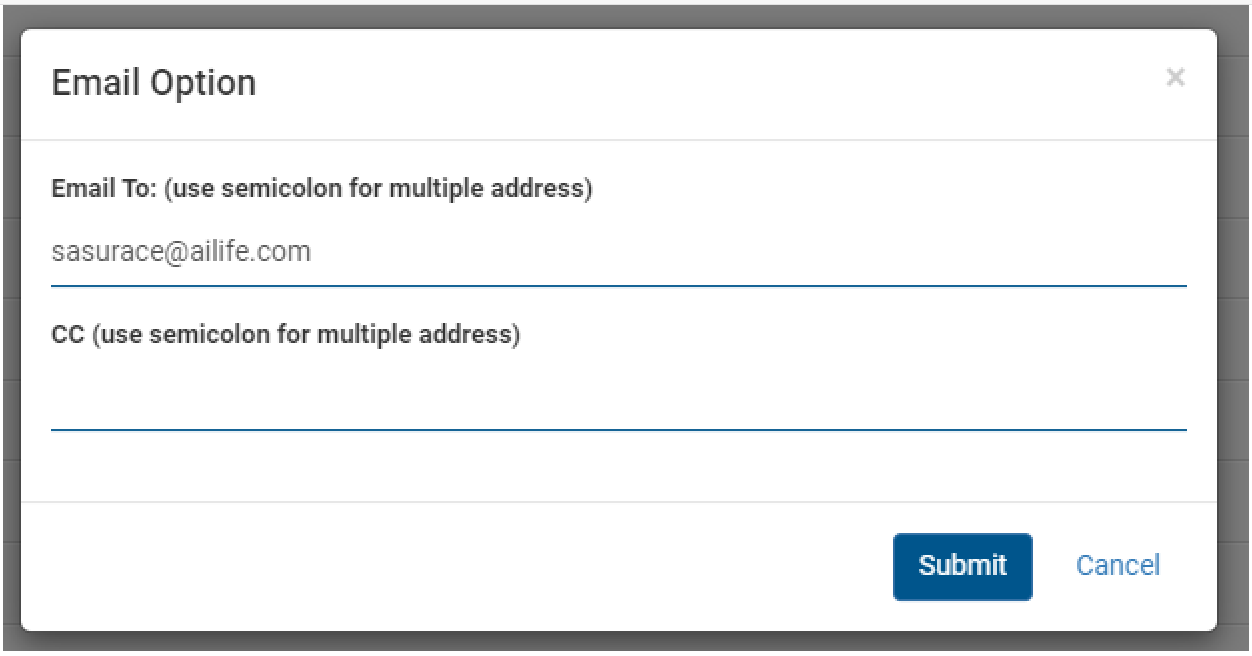
3.2.2.1.3. Contacting a lead from your lead inbox

When using a cell phone and the Call Home or Call Mobile Contact Button are selected, your phone call app will open which will allow you to call the lead. You will then minimize your call app and return to the lead screen and the CALL WHAT HAPENED? Menu will be displayed. You will select the best option available to indicate the result of the call.

Set In Home and Set Virtual will display your schedule allowing you to set for now or at a later time. Once the appointment is scheduled the following reminder will be sent







In Home(no email will be sent only the following text): Hi (clients first name), this is (Agents Name in preference) with (AIL/NILICO/AIL in Canada/AIL of New Zealand) and I am looking forward to meeting with you and your family on (date and time). As we discussed, I appreciate your being available at this time. See you soon!

Virtual: **Text Reminder** - this is automatic and not editable by the agent. The agent cannot stop this. This is NOT Optional
Hi (clients first name), this is (Agents Name in preference) with

(AIL/NILICO/AIL in Canada/AIL of New Zealand) and I am looking forward to meeting with you and your family via a virtual meeting on (date and time). As we discussed, 5 minutes before our meeting, please click the link that has been sent to your email. For the best viewing experience, we recommend using your Tablet or Laptop. See you soon!
Virtual Meeting Link: (from preferences).   If the virtual meeting link is not present – it will say Virtual Meeting Link: Not Available
If you have any issues connecting to the virtual meeting, please contact me at (Agents Phone number in Preferences)

Email Reminder – for virtual appointments only
Hi (clients first name), this is (Agents Name in preference) with (AIL/NILICO/AIL in Canada/AIL of New Zealand) and I am looking forward to meeting with you and your family via a virtual Meeting on (date and time). As we discussed, 5 minutes before our meeting, please click the link that has been sent to your email.
For the best viewing experience, we recommend using your Tablet or Laptop. See you soon!
Virtual Meeting Link: (from preferences). If the virtual meeting link is not present – it will say Virtual Meeting Link: Not Available

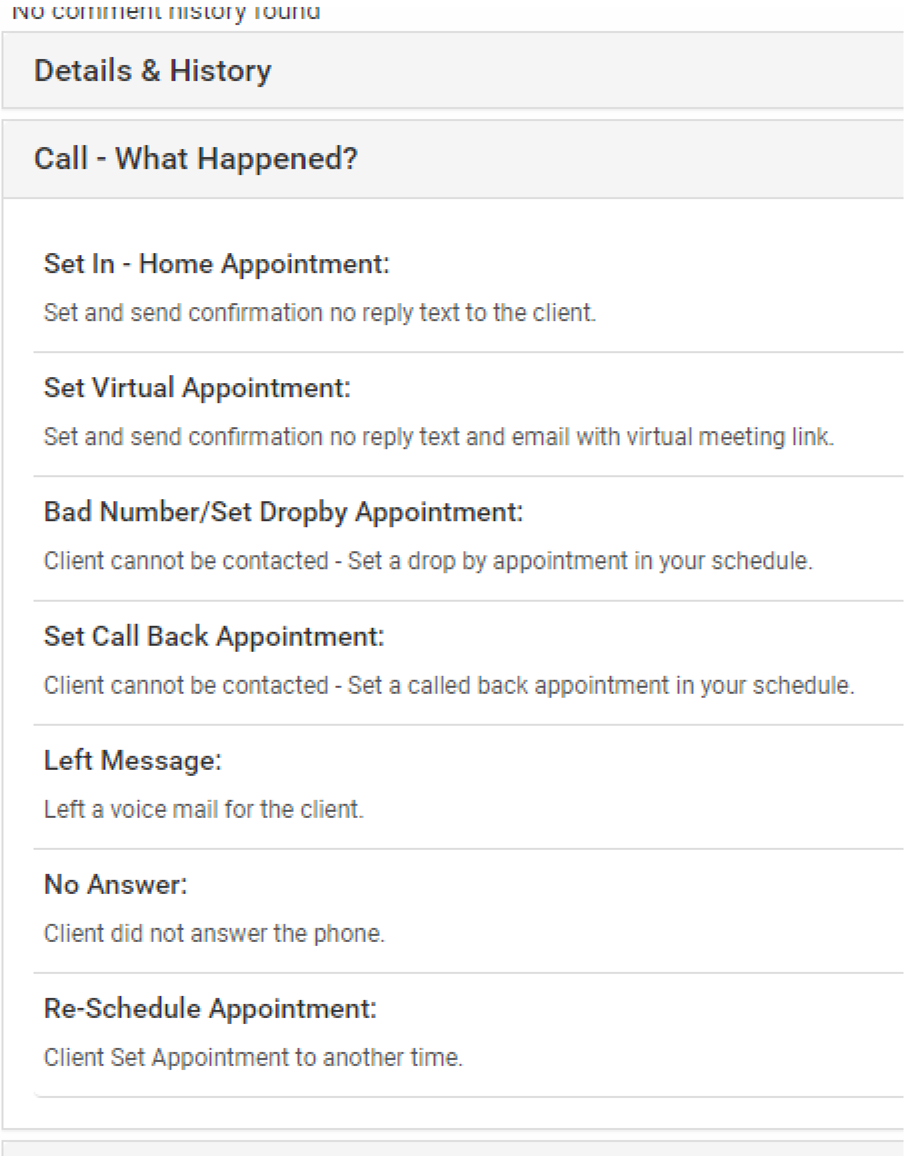
If you have any issues connecting to the virtual meeting, please contact me at (Agents Phone number in Preferences)

Bad Number/Set drop by will allow you to add this appointment to your schedule so you can navigate to the lead and perform a door knock. If you are NOT in the field and you only work virtually, you should RESOLVE as a bad number.

Set a Call Back will put the lead in your schedule during a future time to remind you to call back.

Left Message and No answer will indicate the call was attempted but no other action will be added to the lead until the next time you call it. It will be returned to you lead banks.

Re-Schedule Appointment will be used when a previous appointment was scheduled and you call the client or the client calls your to reschedule for a better time. A new email and text will be sent.



3.2.2.1.3.1. Send Text

When the **Send Text Button** is used, the Send Text- What Happened Screen will appear. When you

select Send Text
A customized text based on lead type will be sent to the client from a no reply phone number. This should be used when the call home and call mobile did not result in a contact.

If the client texts or calls you back and would like to schedule an appointment or Refusing delivery you should find the lead, then select Send Text which will indicate the source used to make the contact. Then use the What Happened screen to indicate your result to set the appointment or resolve the lead.

Send Text - What Happened?

Send Text:
Contact client via text if they are unreachable by phone to schedule an appointment.

Set In - Home Appointment:
Set and send confirmation no reply text to the client.

Set Virtual Appointment:
Set and send confirmation no reply text and email with virtual meeting link.

Bad Number/Set Dropby Appointment:
Client cannot be contacted - Set a drop by appointment in your schedule.

Set Call Back Appointment:
Client cannot be contacted - Set a called back appointment in your schedule.

PRO-TIP: It is very helpful to screen shot the lead image the client filled out and mailed in to prove we are calling due to the clients request and download the original letter from the group using the link at the bottom of the lead detail screen. This will increase your contact ability and responsiveness of your client. For Vendors you can use the literature used to generate the Vendor Lead.

Below is the customized verbiage used to contact the lead based on lead type:

Response Card

Hi, (Clients First Name), we have received the response card you sent in for the No Cost benefits provided through (American Income Life/National Income Life/ American Income Life in Canada / American Income Life in New Zealand) and (group name). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

Referral – Lead type REFER

Hi, (Clients First Name), your (Relationship of Sponsor) (Referred by Name) sponsored you for some No Cost benefits provided through (American Income Life /National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits as they requested and I'm available today. What's your

availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)
If there is no relationship entered we have friend as the default will that still work? Yes

Referral – Lead type Child Safe Mobile (CMAPP)
Hi, (Clients First Name), your (Relationship of Sponsor) (Referred by Name) sponsored you for a No Cost Child Safe Kit provided through (American Income Life/National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits as they requested and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)
If there is no relationship entered we have friend as the default will that still work? Yes

Child Safe Lead Type
Hi, (Clients First Name), we have received your request for the No Cost Child Safe Kit through The Child Safe Program of (American Income Life/National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in

preference).
Contact me at (Agents Phone Number in Preferences)

Will Kit Lead Type
Hi, (Clients First Name), we have received your request for the No Cost Will Kit through The Will Kit Program of (American Income Life/National Income Life/American Income Life in Canada/American Income Life in New Zealand) I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work?
Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

Final Expense Lead Type
Hi, (Clients First Name), we have received your request for the Final Expense Benefit through (American Income Life /National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work?
Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

POS Lead Type/LAPOS
Hi, (Clients First Name), we are reaching out to update your No Cost benefits and provide a review or your policy through (American Income/National

Income/American Income in Canada/American Income in New Zealand). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

List Lead Type – D-Card

Hi, (Clients First Name), we are reaching out to update and renew your AIL Plus Health Service Discount program and No Cost benefits provided through (American Income Life/National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

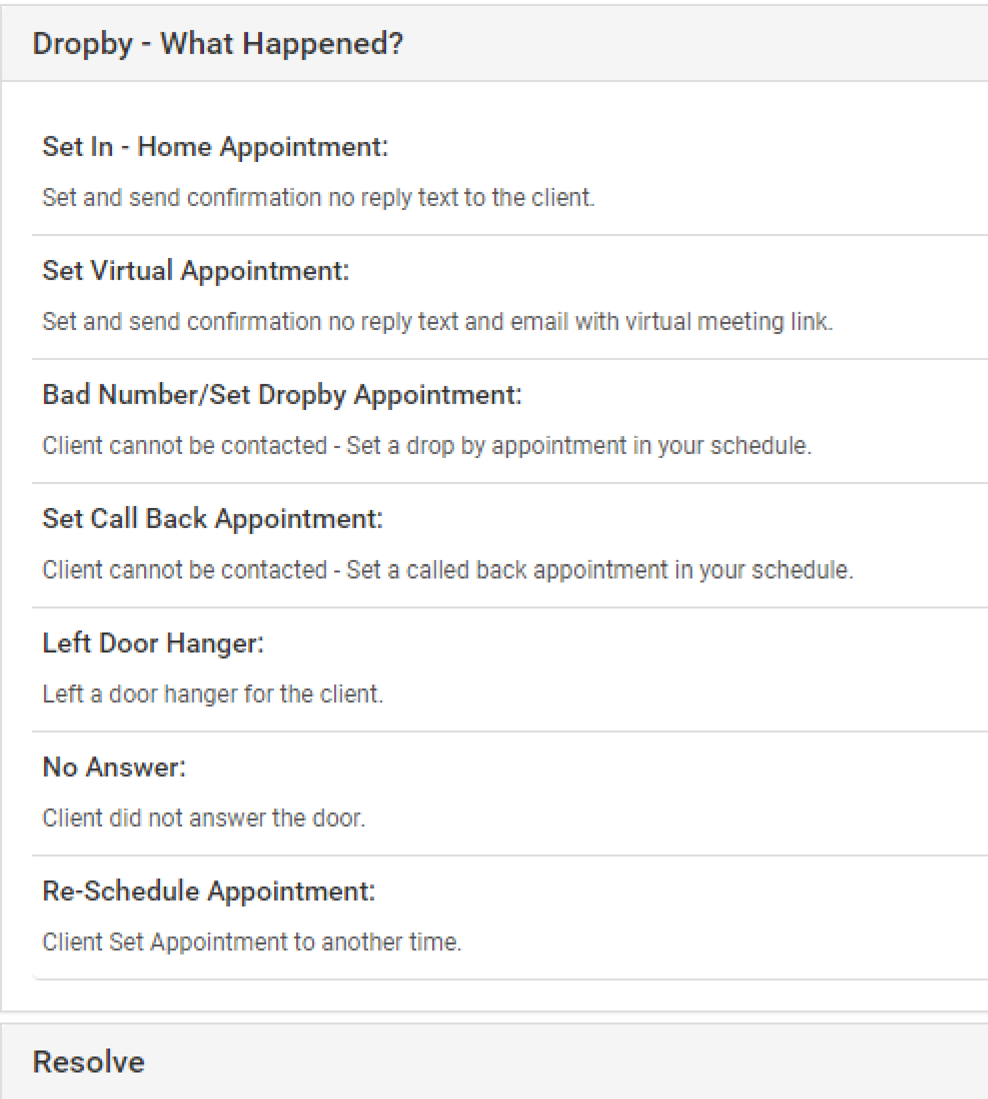
List Lead Type - Globe

Hi, (Clients First Name), as a sister company of Globe Life, American Income Life has been appointed to assist you. I'd like to set a time to review your benefits available and I have openings in my schedule today. What's your availability when you get home from work? Thank you, (Agents Name in preference).

Contact me at (Agents Phone Number in Preferences)

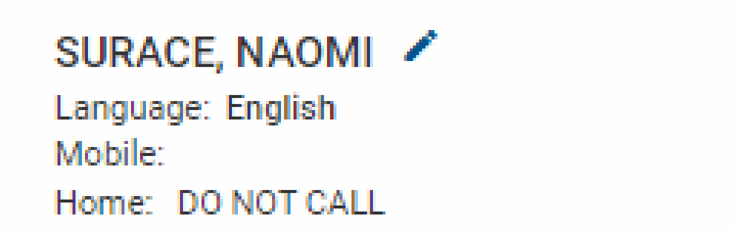
3.2.2.1.3.2. Dropped By

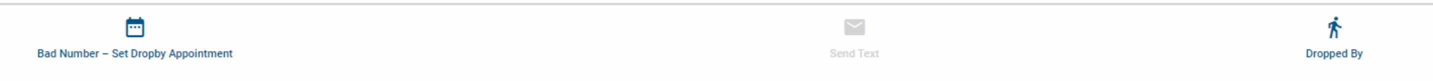
When the Dropped By Button is selected, it means you physically navigated to the leads home and performed a dropby (note: some leads we can NOT door knock per the special instructions from the group). When we perform the drop by you will select the Dropped by button and the Drop by - What Happened screen will allow you indicate and record the results of the drop by.



If The client refuses the appointment or is no longer at the physical location you can Resolve the lead to indicate the same.

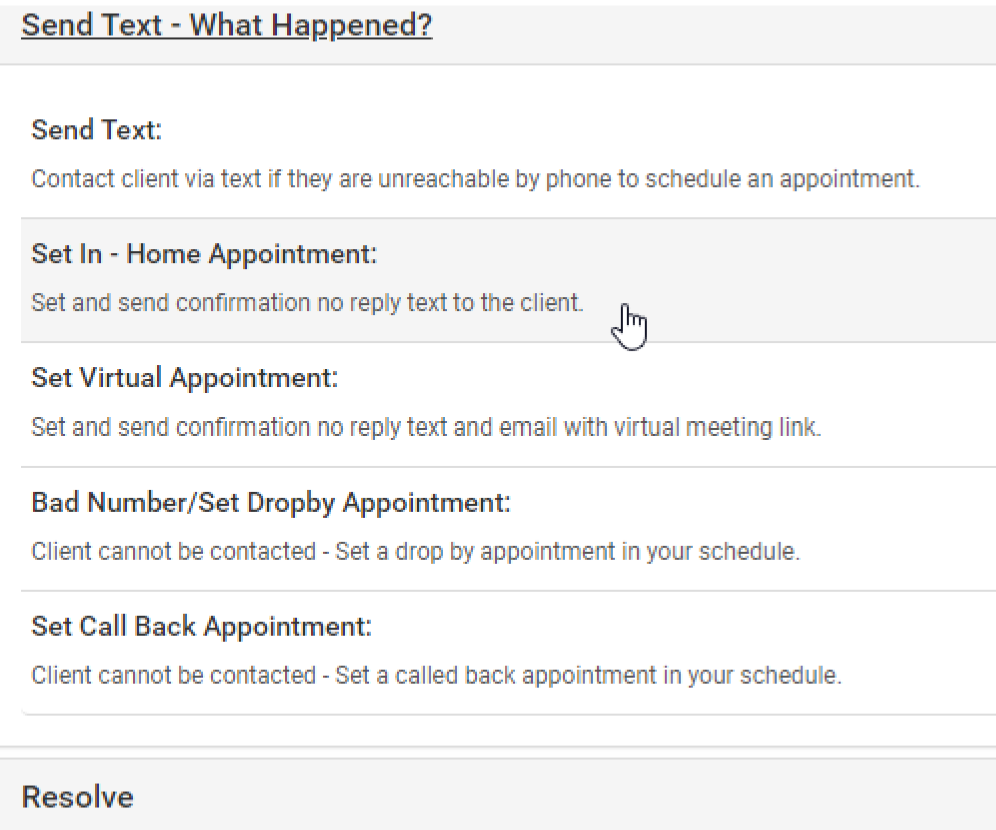
If the lead does not have a phone or is on the Internal Do Not Call List, the only option you will have is to Set a Drop by or Drop by the location.

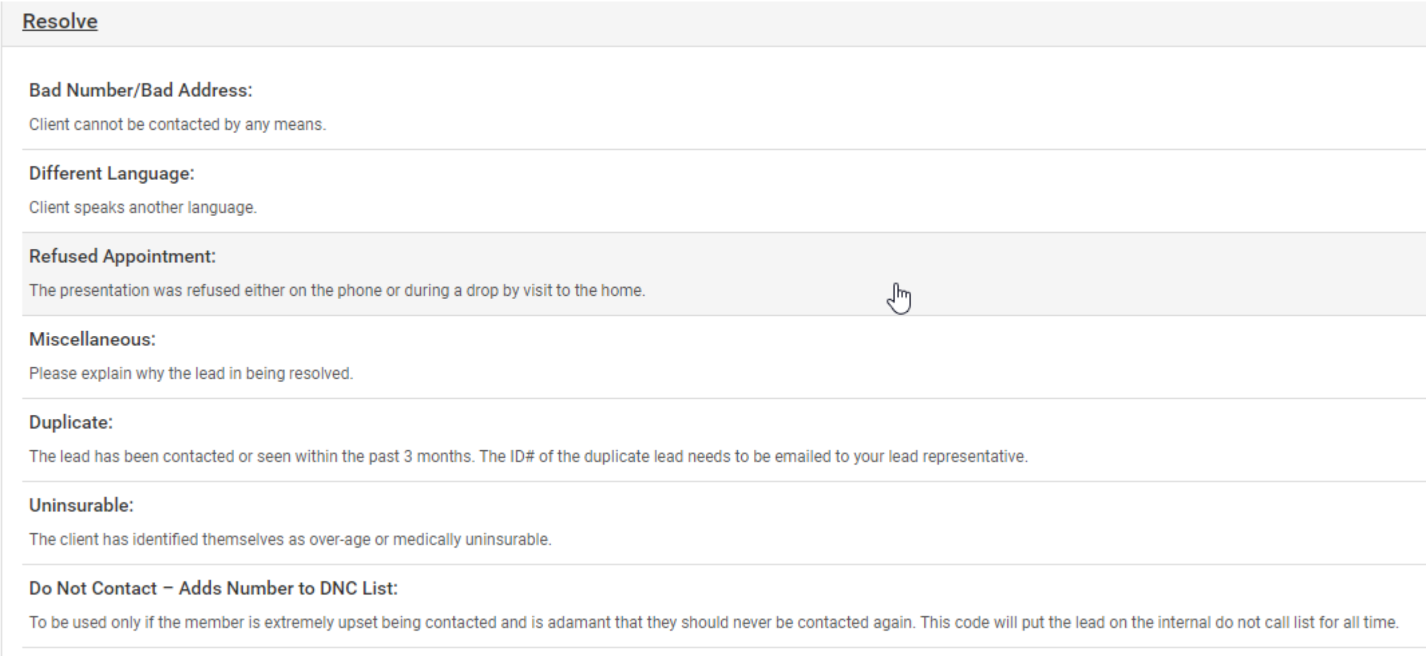




3.2.2.1.3.3. Resolve from a phone call

To Resolve a lead from a phone call, you will open the Resolve Menu from the bottom of the What Happened Screen.





Bad Number/Bad Address: you should only use this if you are 100% virtual or you have no ability to door knock the client. you should also indicate in the notes, any actions that were done to obtain a new phone number.

Different Language: You would use this resolve to indicate the client speaks a language that you do not. Currently we can mark the lead English, Spanish, and French.

Refused Appointment: please indicate why the client refused the appointment.

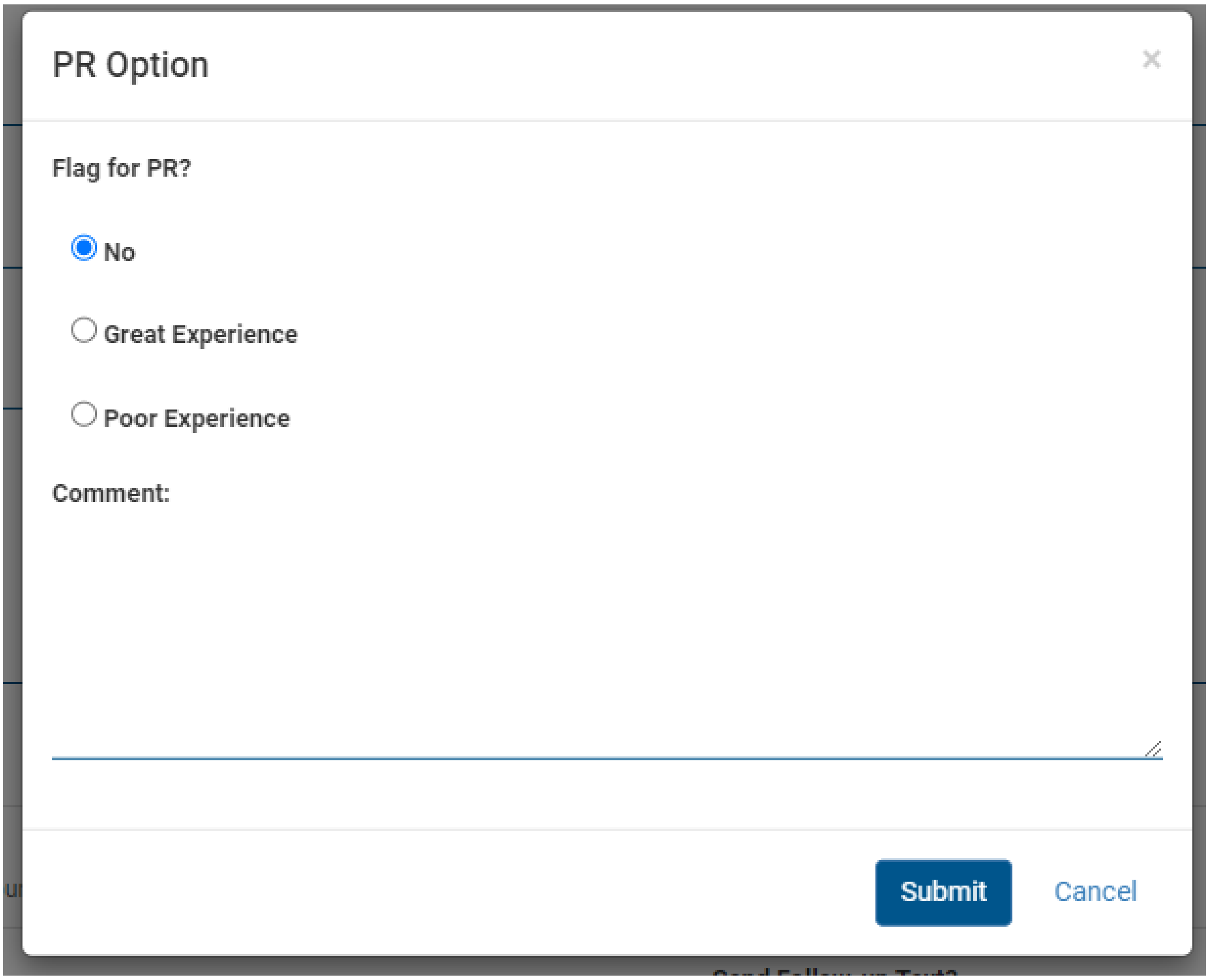
Miscellaneous: Should be rarely used and should always include why you are resolving as a Misc and why it doesn't fit in other resolve definitions.

Duplicate: if the lead was just seen and the client does not want another visit, use this choice.

Uninsurable: Should be rarely used. Remember there are other insurable members in the household to include children or grandchildren. Also you still have the ability to get referrals.

Do Not Contact: This should not be used without the permission and approval of your up line first. Using this resolve will place the clients phone number for the current lead and any future responses on our Internal Do Not Contact list.

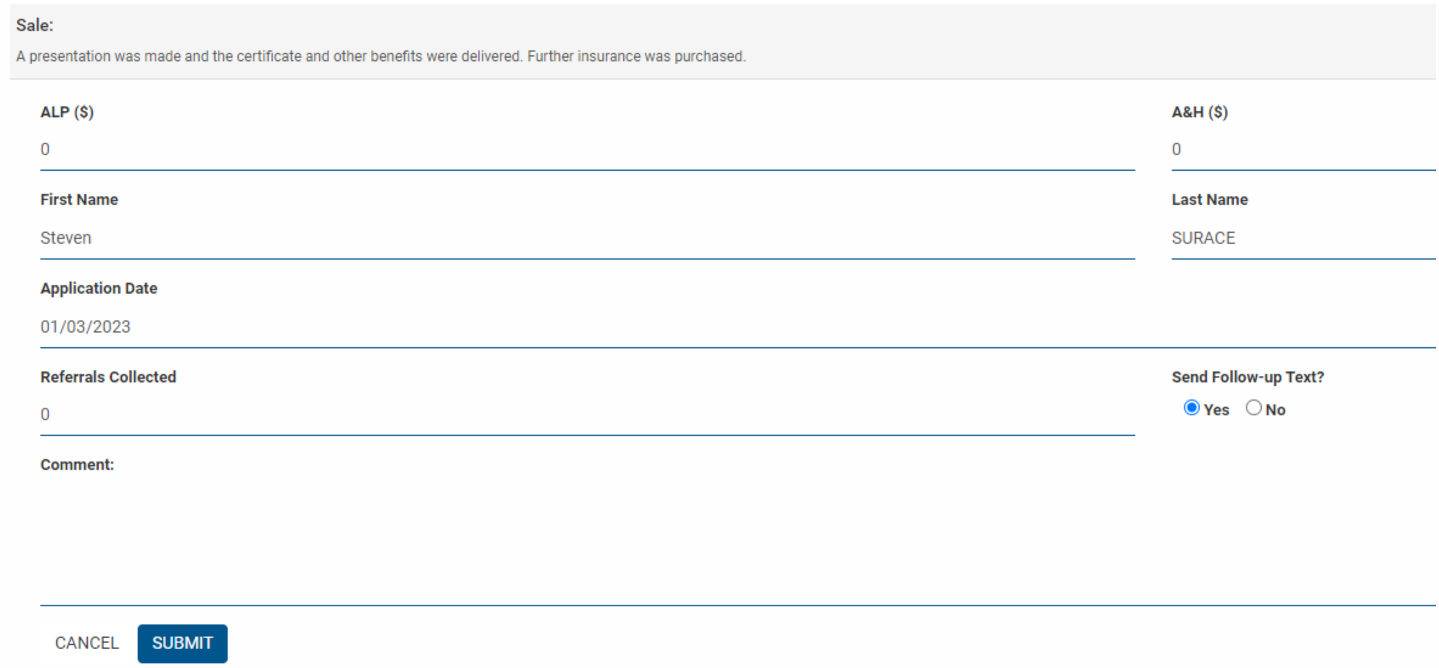
When a lead is resolved you will have the option to leave our Public Relations Team and Your State General Agent a message based on the experience, this will allow our Public Relations Team to be proactive to solve any Union/Association or Credit Union issues.

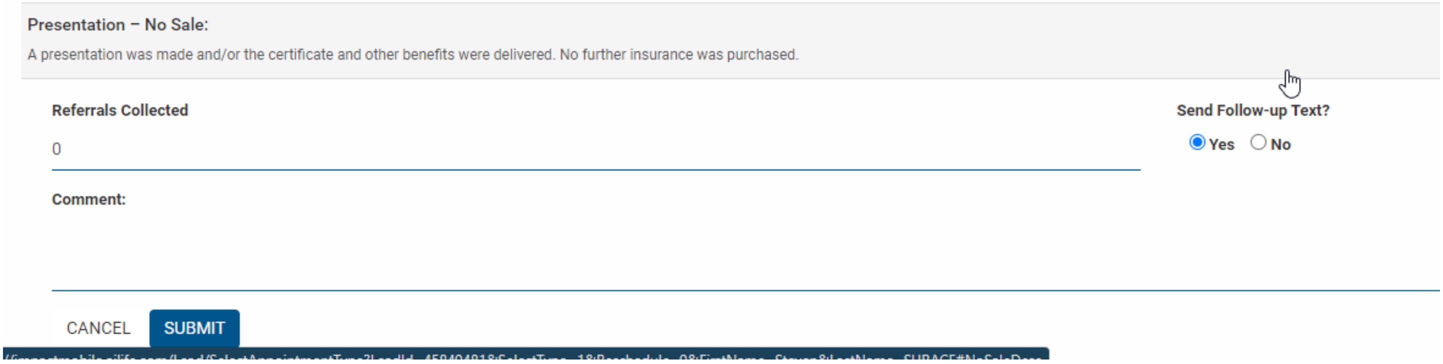


3.2.2.1.4. Resolve a scheduled lead

Upon your scheduled appointment time you can access your lead from your schedule. When the lead is open you will be able to view comments and lead details. You can also Resolve the lead accordingly.

Pres Done- indicates the presentation was given to the client and you will have to report the Sale or No Sales. Sales you will report the Annual Life Premium and amount of Sales Referrals collected. You will be given the choice to send a follow up text which will allow the client to leave a Google Review from their cell phone. Pro-Tip: to obtain more than one Google review per household, ensure you check out of the appointment while the client is present. when the Google link from your preferences is texted to your client have them forward the link to their spouse.




Presentation – No Sale:
A presentation was made and/or the certificate and other benefits were delivered. No further insurance was purchased.

Referrals Collected

0

Send Follow-up Text?

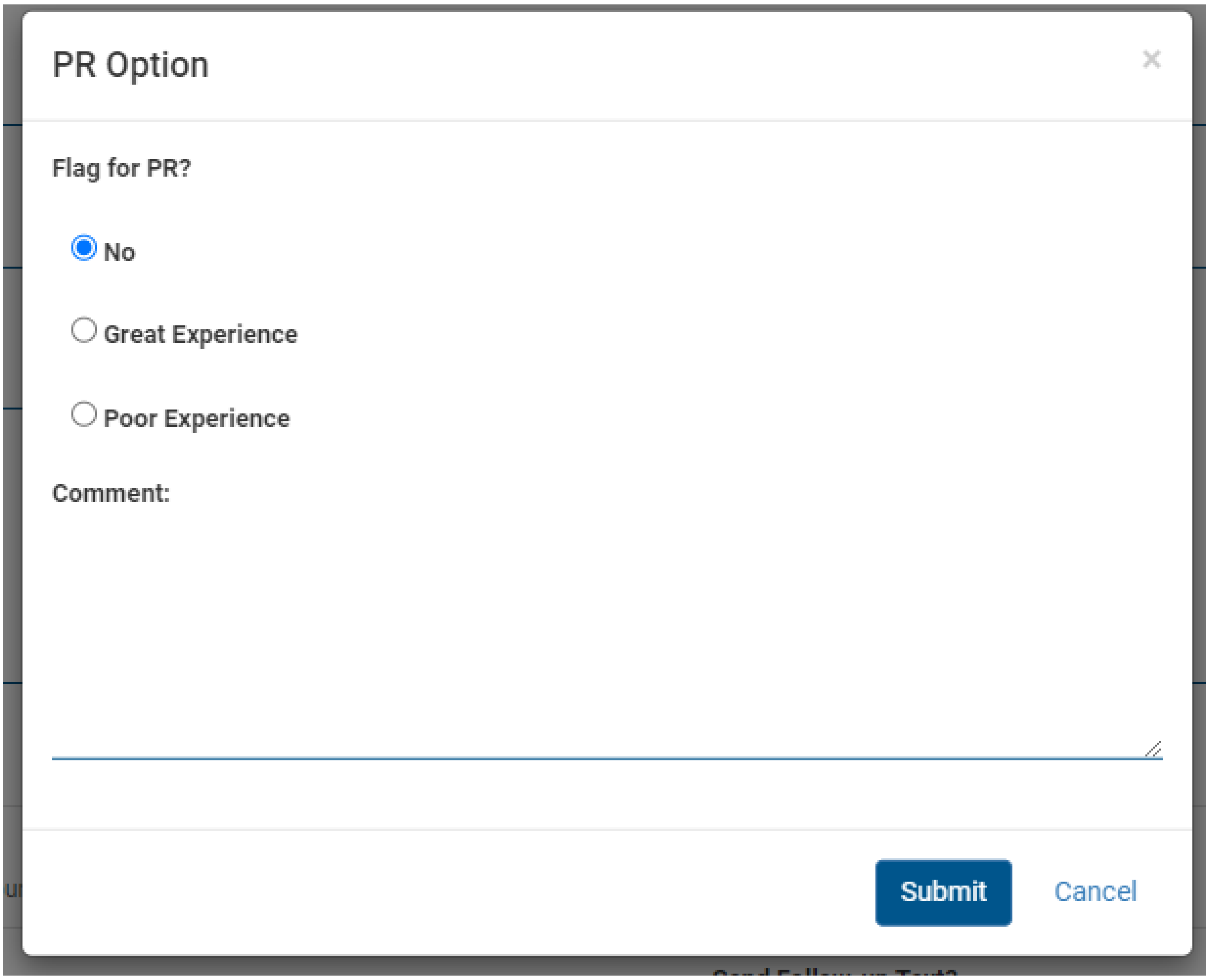
Yes No

Comment:

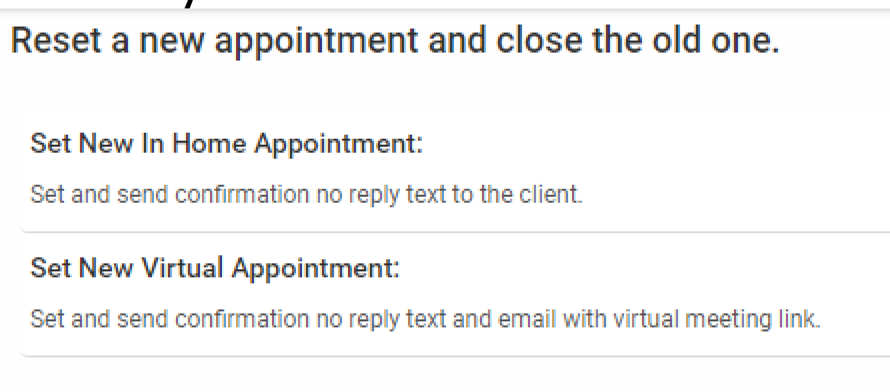
CANCEL SUBMIT

Text Verbiage for Follow up text - Hi (Clients First Name)! Thank you again for taking the time to review your benefits! To help share our services with more working families like yours, I’d really appreciate it if you could leave me a review. If you include my full name, it would really help me out! Thank you again! (Agent name from preference) (review link from preference)

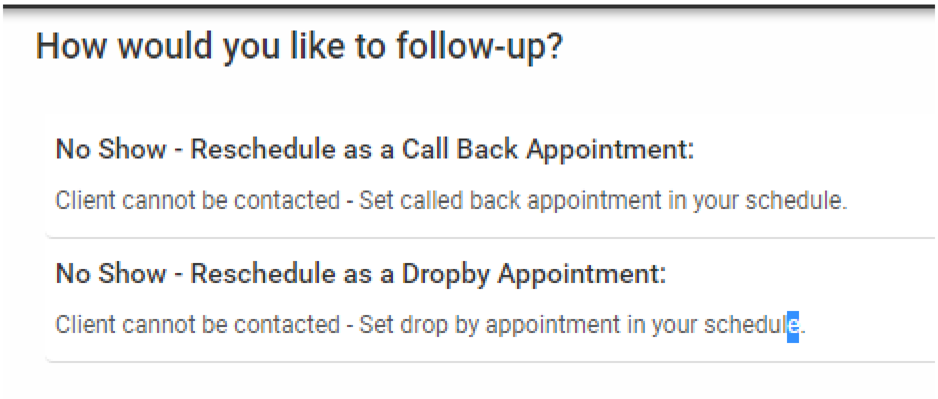
When a lead is resolved you will have the option to leave our Public Relations Team and Your State General Agent a message based on the experience, this will allow our Public Relations Team to be proactive to solve any Union/Association or Credit Union issues.



Reschedule - indicates your client or spouse were present but they could not complete the presentation at the desired time. This will allow you to move it and choose a better time in your schedule.



No Show - indicates the client and spouse did not show for the presentation at the scheduled time. You can now schedule for a call back or a drop by.



How would you like to follow-up?

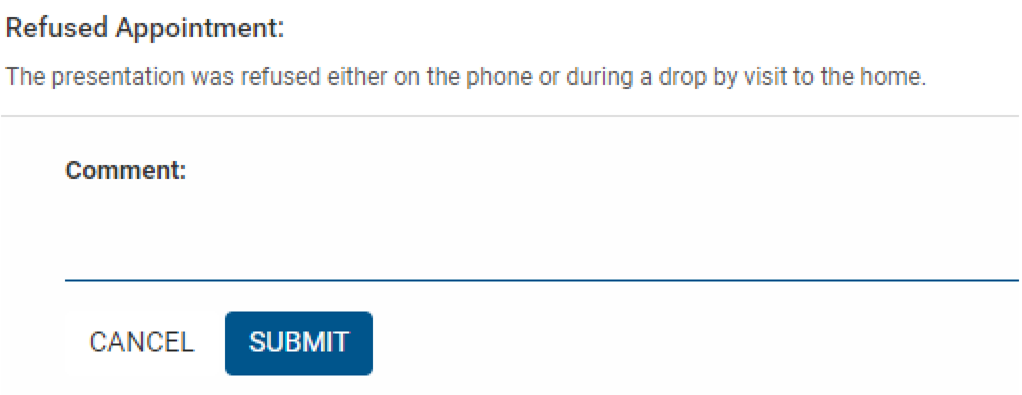
No Show - Reschedule as a Call Back Appointment:

Client cannot be contacted - Set called back appointment in your schedule.

No Show - Reschedule as a Dropby Appointment:

Client cannot be contacted - Set drop by appointment in your schedule.

Refused Appointment - indicates the client did not allow us to present the cost benefits. You will leave a comment and you can you will have the option to leave our Public Relations team a message if necessary.

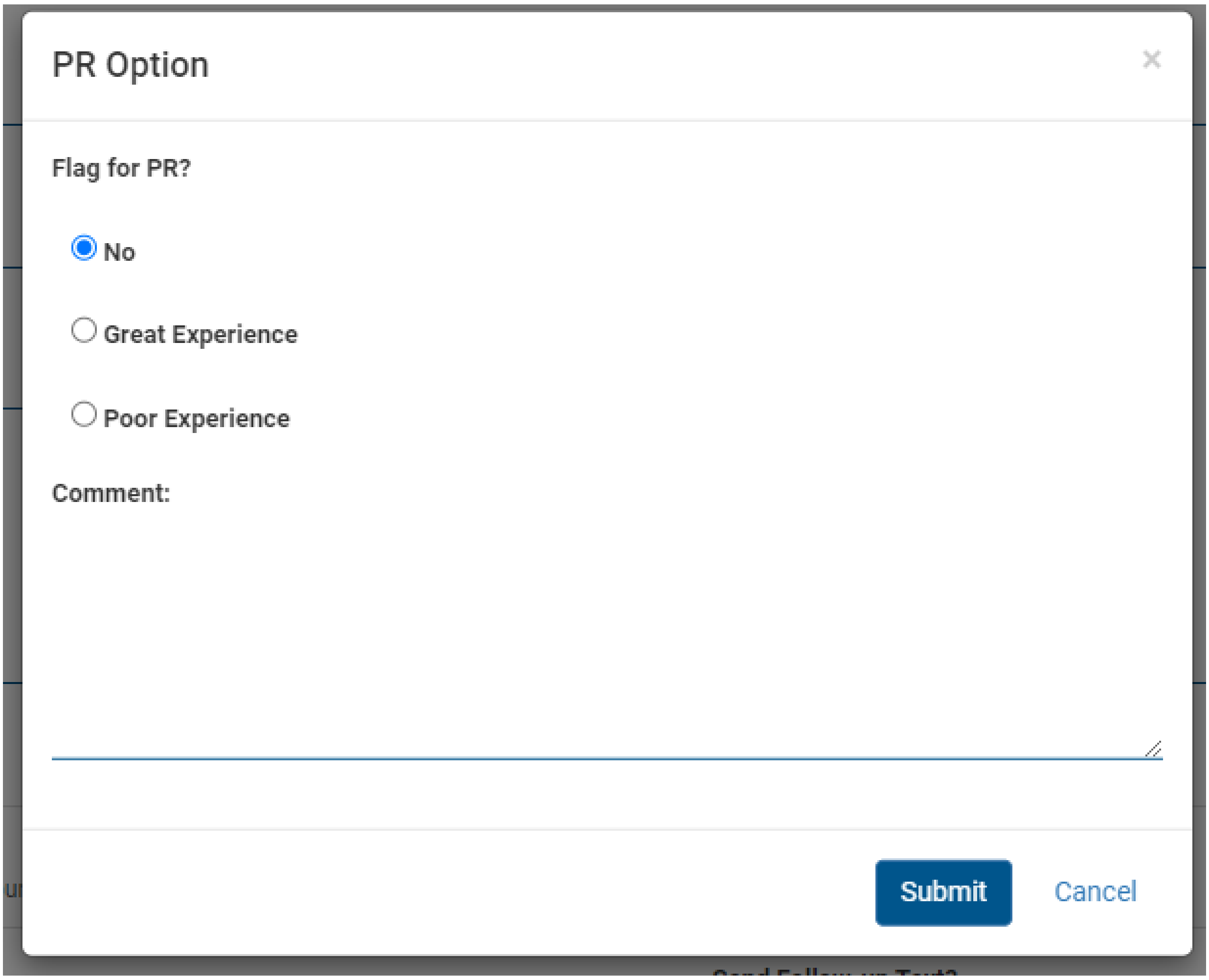


Refused Appointment:

The presentation was refused either on the phone or during a drop by visit to the home.

Comment:

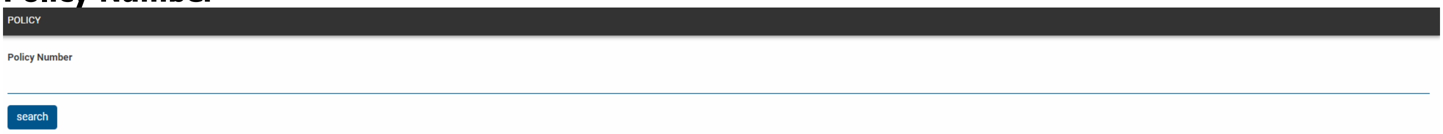
CANCEL SUBMIT



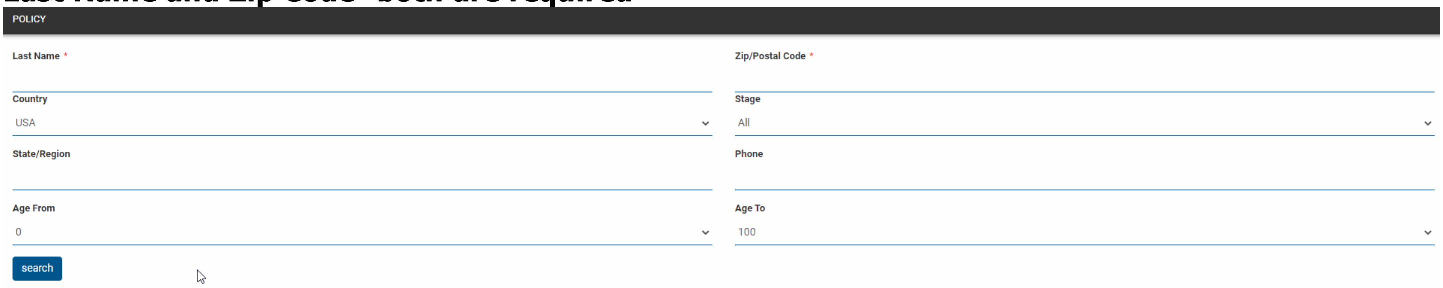
3.2.3. Policy

The Policy screen allows you to search by the following criteria:

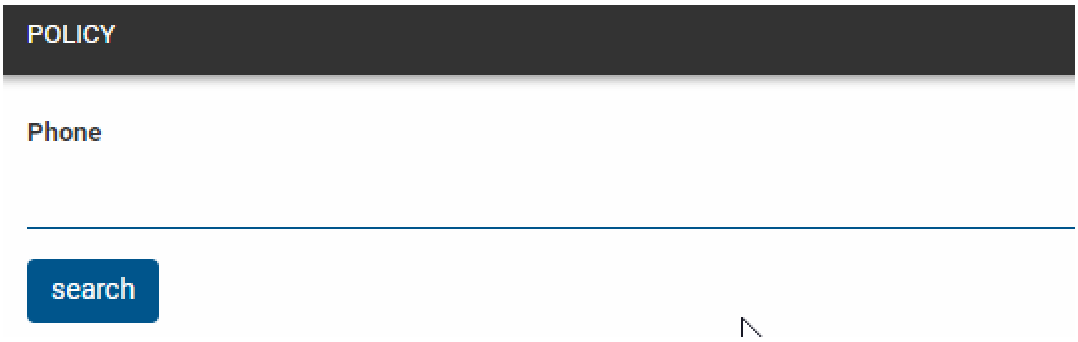
Policy Number



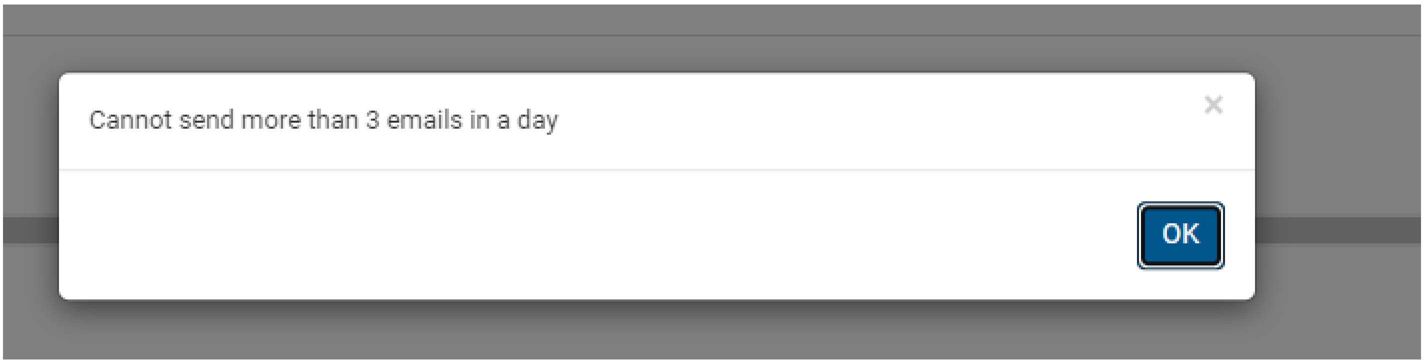
Last Name and Zip Code- both are required



Phone Number



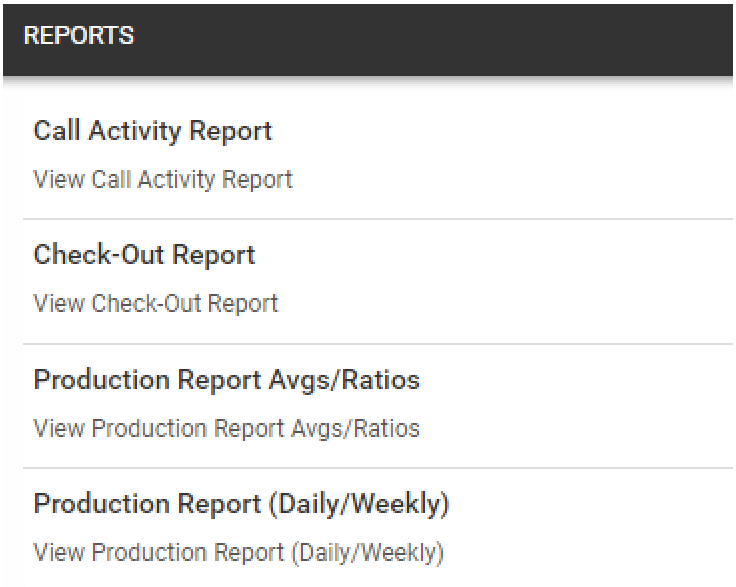
**An agent can search and view an unlimited amount of policies, each policy will have its policy details and any associated household policy details. An agent can send 3 PDF files daily to their email that is connected to their Impact Account. This email can be changed and edited by the SGA or SGA Admin from Impact Admin.



**Your SGA has the Option to disable the search function based on Agent Contract Level. This will prohibit the Policy Search Function from opening.

3.2.4. My Reports

Reports



Call Activity Report: This report will show you the

Daily/Weekly/Monthly results of yours or your assigned agents efforts during a Phone session. It is recommended for every hour of call activity, an agent should average a minimum of 30 calls. Your Weekly calls should be between 500 and 1000 calls per week. Calls to Contact should average around 20. Calls to Appt should average around 35. Contact to Appt % should average 50%. These are based on Company Averages. To improve these areas please contact your Manager for tips and training. This tool can be viewed hourly to ensure yours or your agents are on pace to being productive during a daily phone session.

Name	Total Calls	Contacts	In-Home Appointments	Virtual Appointments	Calls to Contact	Calls to Appt	Contact to Appt %

<u>Check-Out Report:</u> This report will show you the Daily/Weekly/Monthly results of yours or your assigned agents check out results. This includes Pres-Sales, Pres-No-Sales, Resets, No-Shows, Drop Bys and Refused Appointments. This is separated by In-Home and Virtual.

In-Home Virtual

Name	Check-Out	Pres-Sales	Pres-No-Sales	Resets	No-Show	Drop Bys	Refused

View Daily Production Report Avg/Ratios

This report will show you the Weekly results for Show Ratio, Referrals per preso, ALP and A&H per sale, and closing ratio and closing ratio per lead type. This report is heavily dependent on accurate reporting when a lead is checked out.

The Production Report with Avg Ratios is a statistical view of the Production Weekly Report. You will have the ability to view all of the agents in your hierarchy. All user levels will have access to this option.

The values are determined by the following calculations:
Total Show % Presentation Total/Appointments Total
From the Field (Drop By + Home + Car)/Appointments Total
Avg Ref Per Pres Referrals Collected/Presentation Total
Close Ratio % Sales Total/ Presentation Total
Avg ALP/Sale ALP/Sales
Avg A&H/Sale A&H/Sales
Referral Close% Sales Referral/Presentation Referrals
POS Close% Sales POS/Presentation POS
Child Safe Close% Sales Child Safe/Presentation Child Safe
Response Card Close% Sales Response Card/Presentation Response Card
Avg ALP/Sale ALP/Sales

Export to Excel

This option allows you to export the production report avg/ratios to an excel file.
Click Export to excel to generate the file and open in Excel.

Production Report With Avg Ratios

Week Starting Day:

Monday

Report Type:

Weekly | Monday, January 2, 2023

Export to excel

	Presentation	Appointments Booked	Referral	Sales							
Name	Total Show %	FromtheField	AvgRefPerPres	CloseRatio	Avg ALP/Sale	Avg A&H/Sale	Referral Close%	POS Close%	LPOS Close%	Child Safe Close%	Response Card Close%
JUBREY STEPHEN J (SGA-RGA-MGA) **(SGA)**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
KAITLYN BRANDT **(RGA)**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

This report will display your weekly and daily appt, preso, referral and sales results for you and your assigned team.

The Production Report (Daily/Weekly) allows you to view production results for the SGA office for the week. You will have the ability to view all of the agents in your hierarchy.

All user levels will have access to this option.

View Daily Production Report
The Daily Production Report allows you to view production results for the SGA office for a specific day. You will have the
ability to view all of the agents in your hierarchy.
1. Select Production Report (Daily/Weekly) from the Production menu
2. Select the daily for the Report Type and select the appropriate day.
3. Notice the week staring day, this is set from Impact Manage.

View Weekly Production Report
The Weekly Production Reports allows you to view production results for the SGA office for the week. You will have the
ability to view all of the agents in your hierarchy.
1. Select Production Report (Daily/Weekly) from the Production menu.
2. Select the weekly for the Report Type and select the appropriate day.
3. Notice the week staring day, this is set from Impact Manage.

Export to Excel
This option allows you to export the daily/weekly production report to an excel file.
Click Export to excel to generate the file and open in Excel.

Week Starting Day
The week starting day is set from Impact Manage.
1. Login to Impact Manage.

2. Select the day of the week for the starting day and click save.

Daily Company Production Report

Week Starting Day:

Monday

Report Type:

Weekly

Monday, January 2, 2023

Export to excel

	Appts	Presentation							Appointments Booked			Referrals	Personal Recruit	Sales									
Name	Total	Total	Referral	POS	LPOS	Child Safe	Response Card	List Lead	Drop By	Home	Car	For Next Day	Collected	Total	Sales	ALP	A&H	Referral	POS	LPOS	Child Safe	Response Card	List Lead
JUBREY STEPHEN J (SGA-RGA-MGA) **(SGA)**	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0.00	0	0	0	0	0	0
KAITLYN BRANDT **(RGA)**	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0.00	0	0	0	0	0	0
STEPHEN JUBREY	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0.00	0	0	0	0	0	0

3.2.5. Update Links

This is the section an agent will use to set up their links and preferences. This is very important this is completed in the on boarding process in order for Impact Mobile to work correctly.

UPDATE LINKS AND PREFERENCES

Virtual Meeting Link

The virtual meeting link added will be displayed when the automated text is sent out when setting a virtual appointment.

Review Link

The review link added will be displayed when the automated text is sent out when resolving as a sale or presentation – no sale.

Preferred Name

Agent Identification

Upload a professional image of yourself that will be included in all text messages sent from Impact.

Image Review

Image Review.

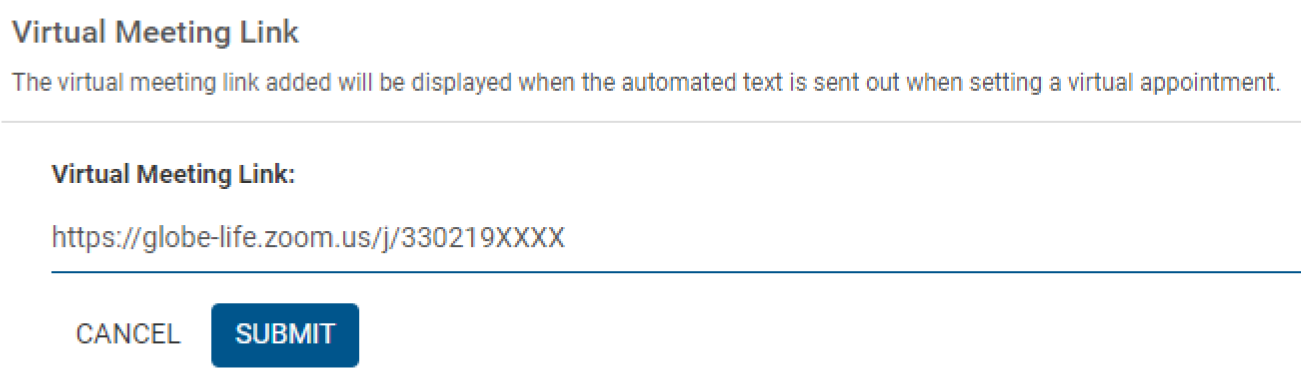
3.2.5.1. Virtual Meeting Link

The Virtual Meeting Link is where the agent will put the link to the Virtual Meeting they want the client to meet them at during the scheduled appointment. Once the appointment is set in Impact Mobile, this link is automatically texted to the client and emailed as well. The email can be sent to other attendees or your managers or trainees as well.

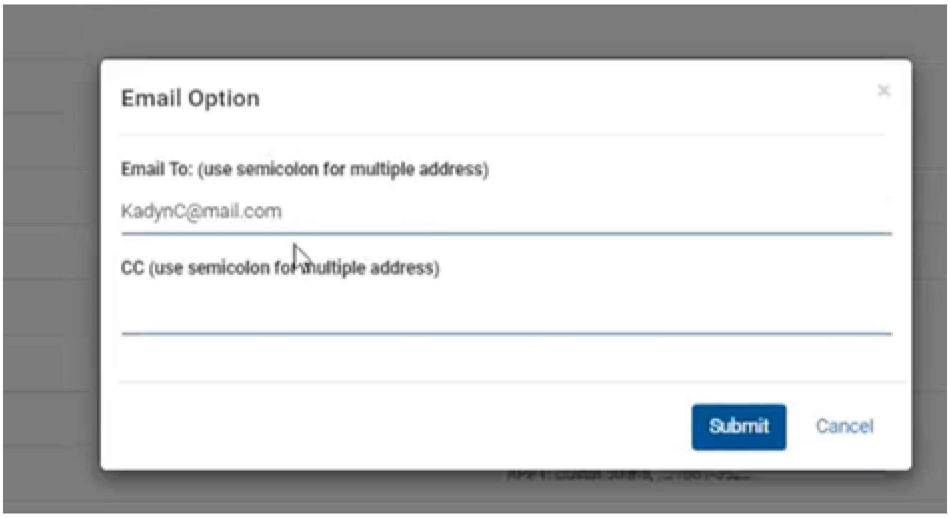
This address should be static (does not change). If you are using Zoom, this would be your Personal Meeting ID (PMI) set up in your Zoom Setting or Your Agencies Virtual Office ID. Your zoom settings should be set to use your PMI for all scheduled or instant meetings. You should also ensure your waiting room is turned on to avoid your next client interrupting your current presentation. When someone enters your waiting room you should be audibly notified through Zoom and your can chat with your client through Zoom.

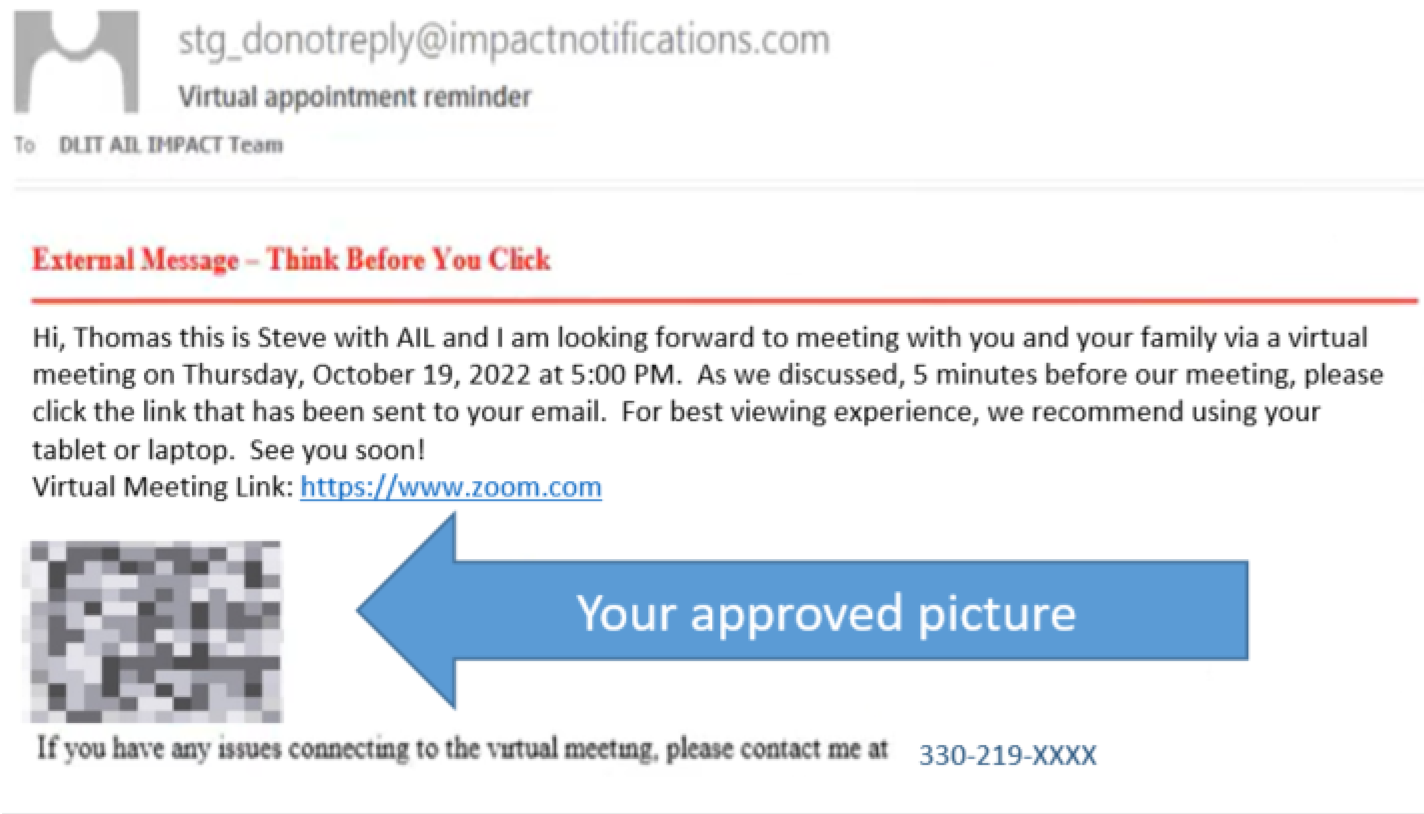
You do NOT need a paid account to have a PMI. You can use other virtual meeting programs, just ensure you have a fixed or static meeting id set up.

Click here for Video Explanation




Hi, Thomas this is Steve with AIL and I am looking forward to meeting with you and your family via a virtual meeting on Thursday, October 19, 2022 at 5:00 PM. As we discussed, 5 minutes before our meeting, please click the link that has been sent to your email. For best viewing experience, we recommend using your tablet or laptop. See you soon!
Virtual Meeting Link:
https://www.zoom.com
If you have any issues connecting ot the virtual meeting, please contact me at 330-219-XXXX


Email Option
Email To: (use semicolon for multiple address)
KadynC@mail.com
CC (use semicolon for multiple address)
Submit
Cancel



stg_donotreply@impactnotifications.com

Virtual appointment reminder

To DLIT AIL IMPACT Team

External Message – Think Before You Click

Hi, Thomas this is Steve with AIL and I am looking forward to meeting with you and your family via a virtual meeting on Thursday, October 19, 2022 at 5:00 PM. As we discussed, 5 minutes before our meeting, please click the link that has been sent to your email. For best viewing experience, we recommend using your tablet or laptop. See you soon!

Virtual Meeting Link: https://www.zoom.com

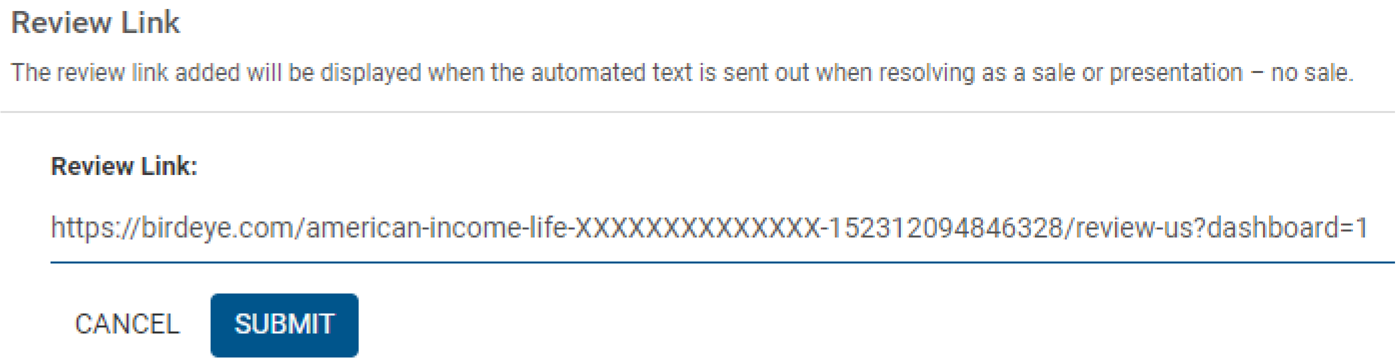
Your approved picture

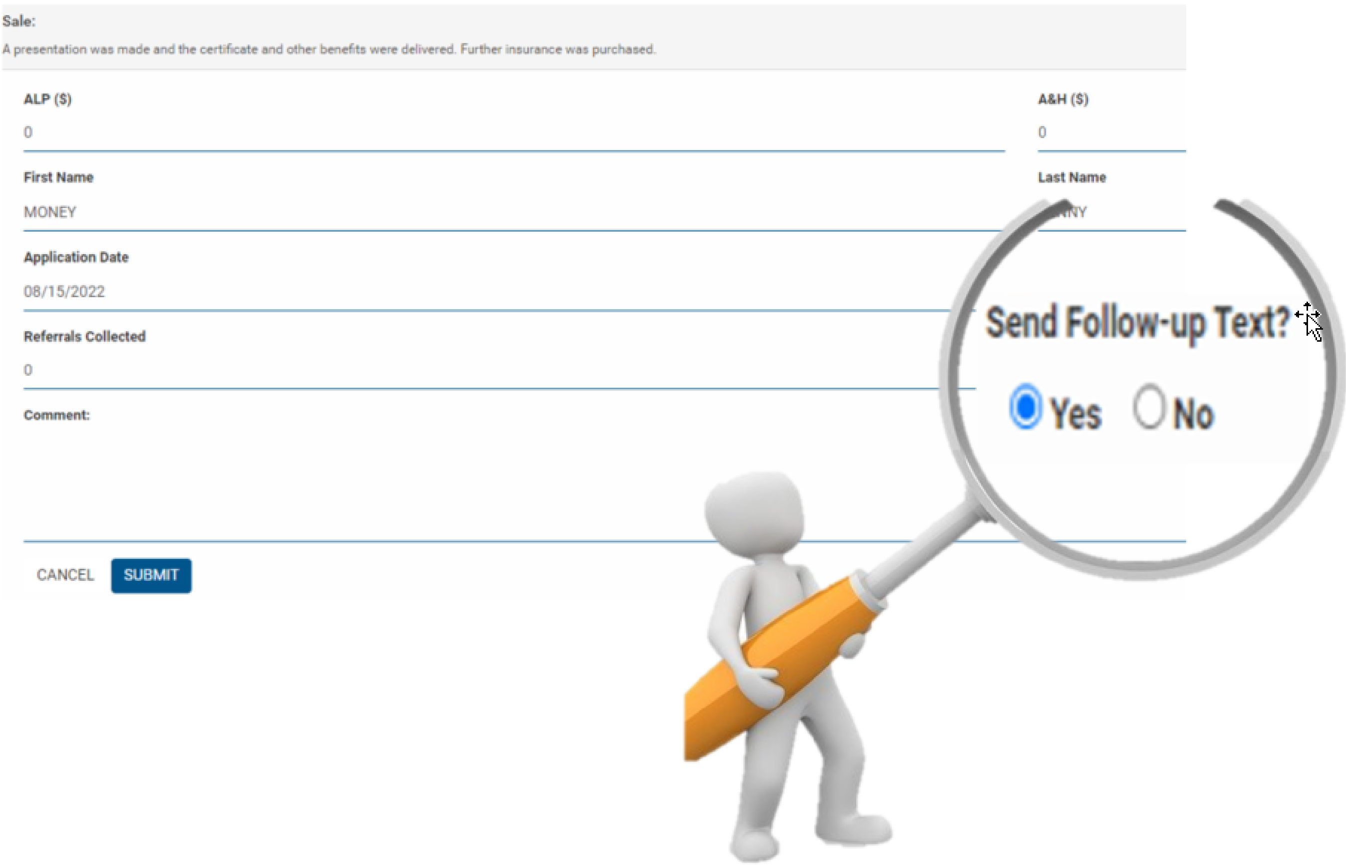
If you have any issues connecting to the virtual meeting, please contact me at 330-219-XXXX

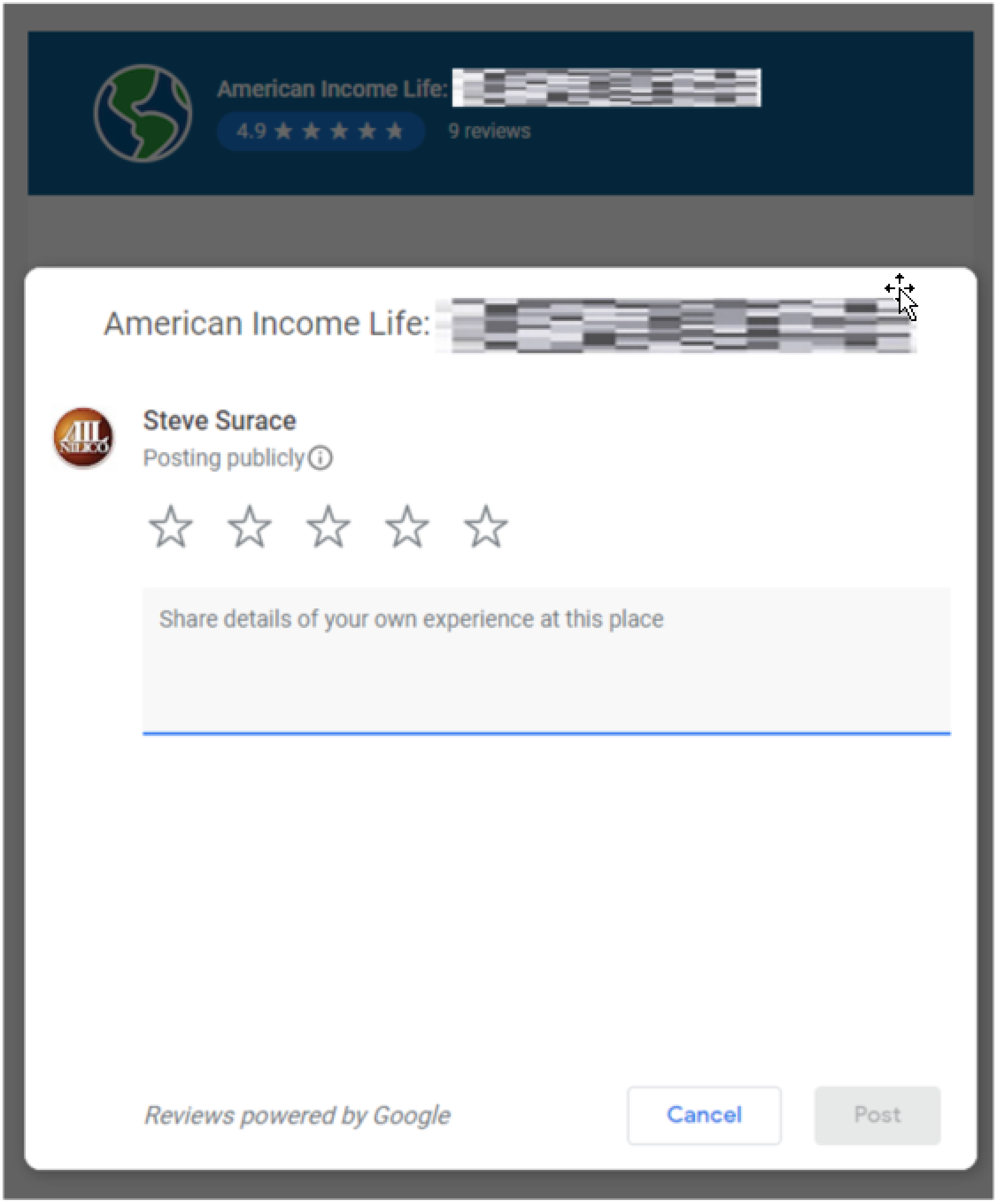
3.2.5.2. Review Link

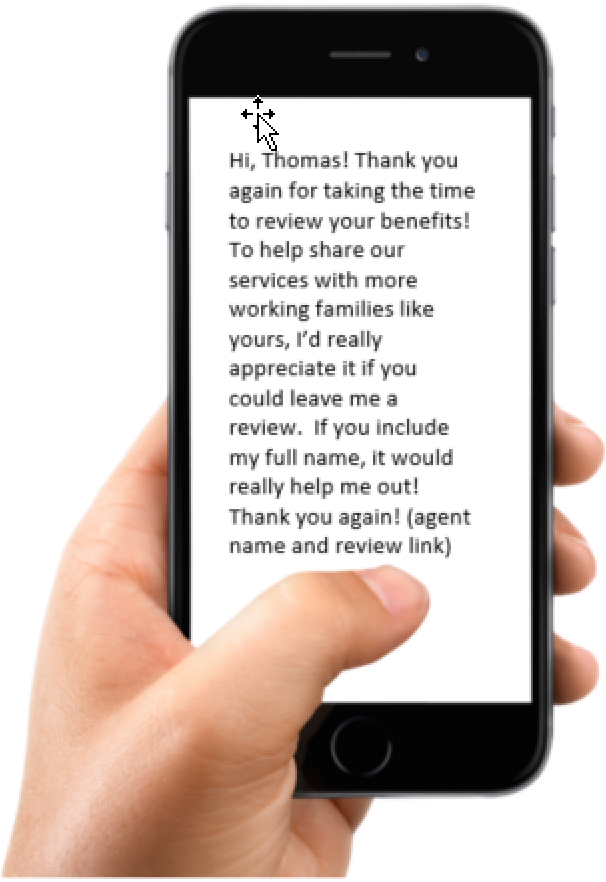
Review Link- The Agent must obtain the Google Review link from their SGA. Do NOT copy and paste the link from the agency Google page. The Google link provided by the SGA is a direct link to the review page. This allows the client to grade the presentation and products with a 5 star scale and provide a comment without the distraction of all the other items on their Google page. At the end of each presentation during the check out process, Impact will give the option to send the Google Link (send follow up text - default is yes) to the clients cell phone. It is strongly recommended the agent check out while the client is still on the virtual call or while the agent is still with the client. The agent can verify the Google review link has been received and filled out by the client. HINT: if you would like to get more than one review per household, you can have the client forward their texted link to another family member that was present for the presentations.

[Click here for video explanation]






American Income Life:
4.9
9 reviews
American Income Life:
Steve Surace
Posting publicly
Share details of your own experience at this place
Reviews powered by Google
Cancel
Post



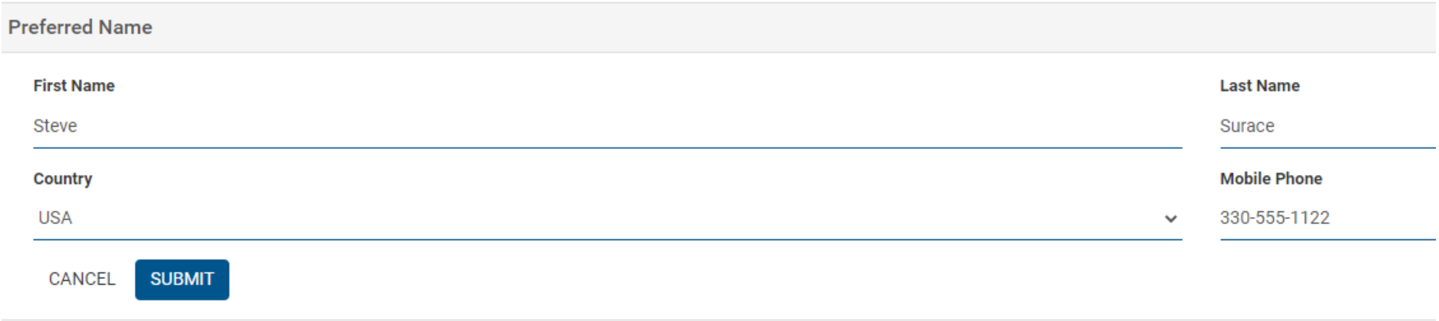
3.2.5.3. Preferred Name

This is where the agent can modify their legal name to use a shortened or preferred name. The agent can also change their mobile number if they are using a business phone or other phone line service like Google voice, sideline, etc...

[Click here for video explanation](#)

This information is used for the following

Initial Text Contact
Reminder Email and Text message
Review Link- Google review
Reminders sent from schedule (coming soon)



3.2.5.4. Agent Identification

This is where an agent can upload a preferred professional head shot or approved ID badge which some agencies use to identify some or all of the following; agents photo, union affiliation and or state license.

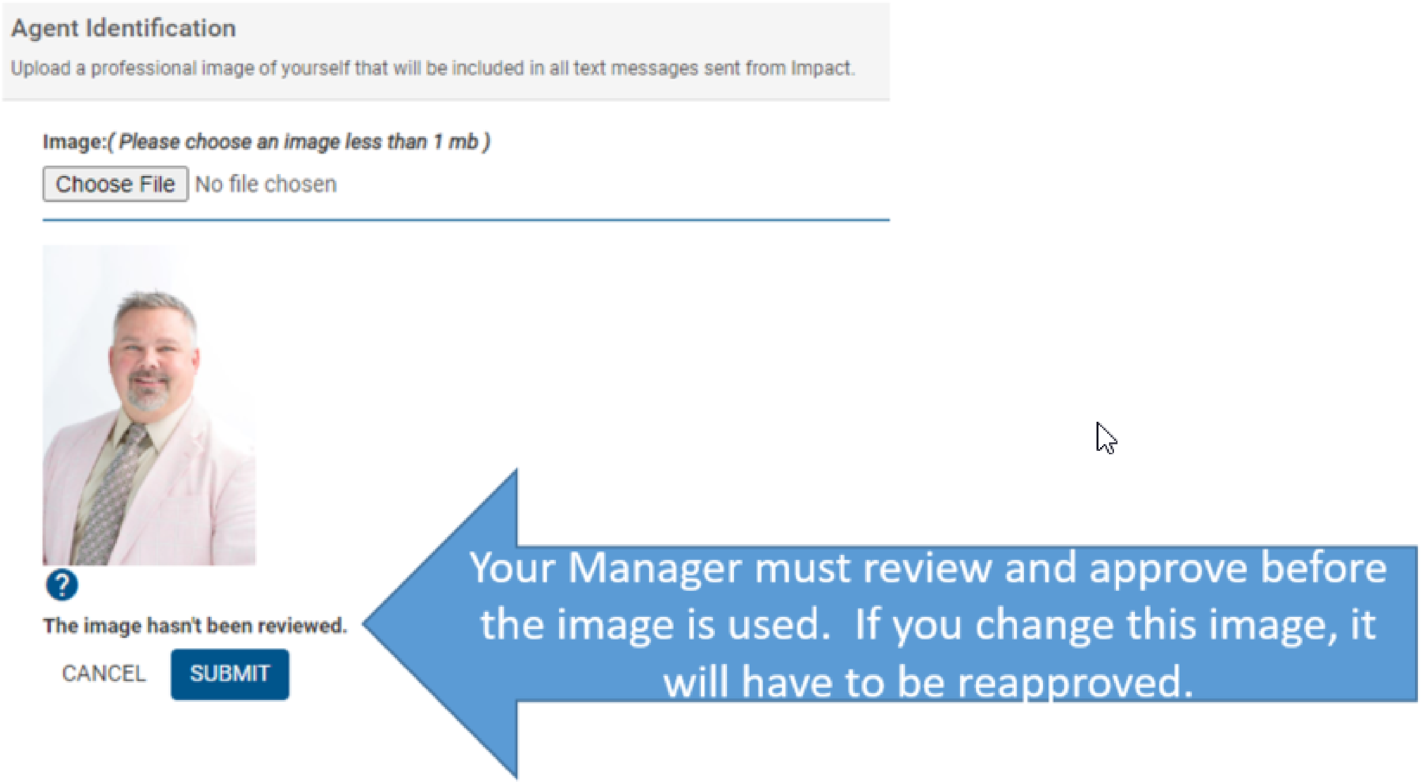
Click here for video explanation

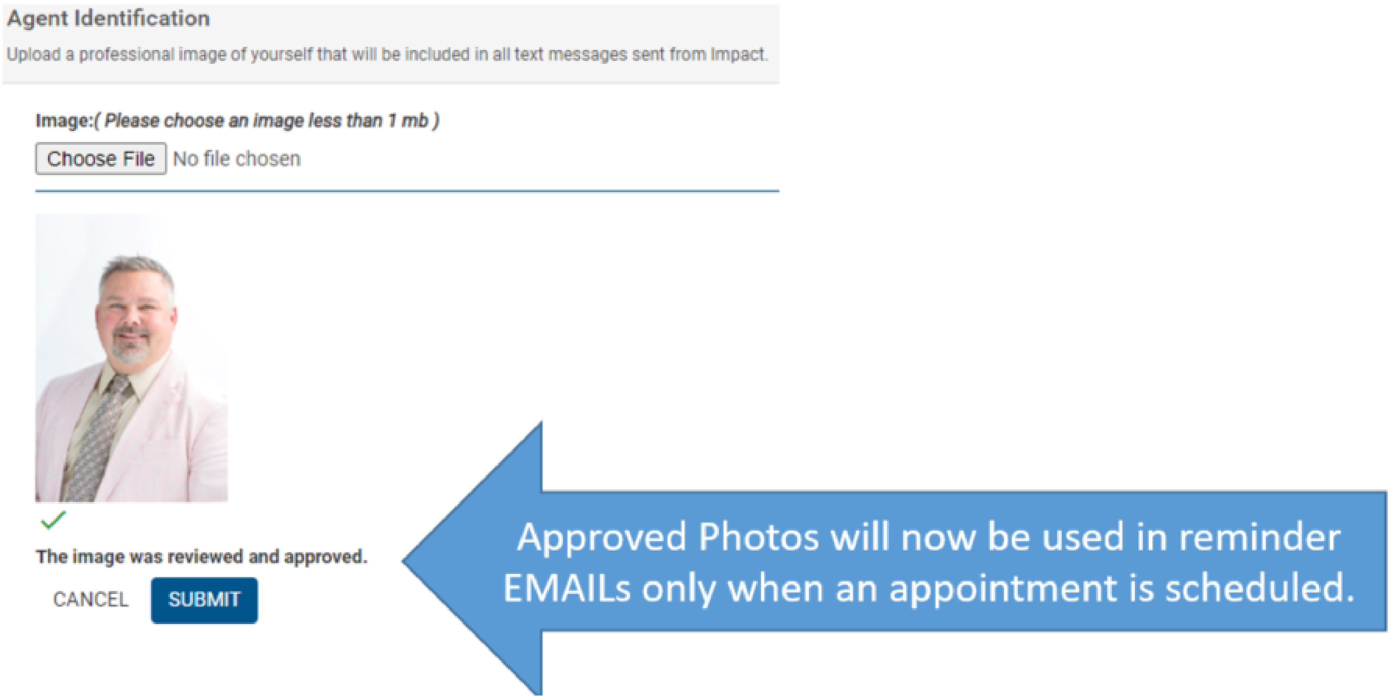
The file must be less than 1mb and in an image format; .jpeg, .jpg, .png, .gif, .bmp

This video will show you how to reduce the size of any photo. Click here to view Video

If you have an ID badge that is save as a PDF and you have Adobe Pro, it can be used to convert the PDF to an Image File. There are other programs that convert PDFs to Image files.

Click here if you have Adobe Pro





3.2.5.5. Image Review - For Managers Only

Image Review is for managers only. When an agent uploads an image in Agent Identification, prior to use it must be approved by a manager. The Manager can Approve or Reject the image.

Once the image is approved, it will now be included in Email reminders after the appointment is scheduled.

If a 'No Image' is displayed the, agent who uploaded, either uploaded an incorrect file or a file that was too large. (refer to video on how to reduce the size of an image in Agent Identification)

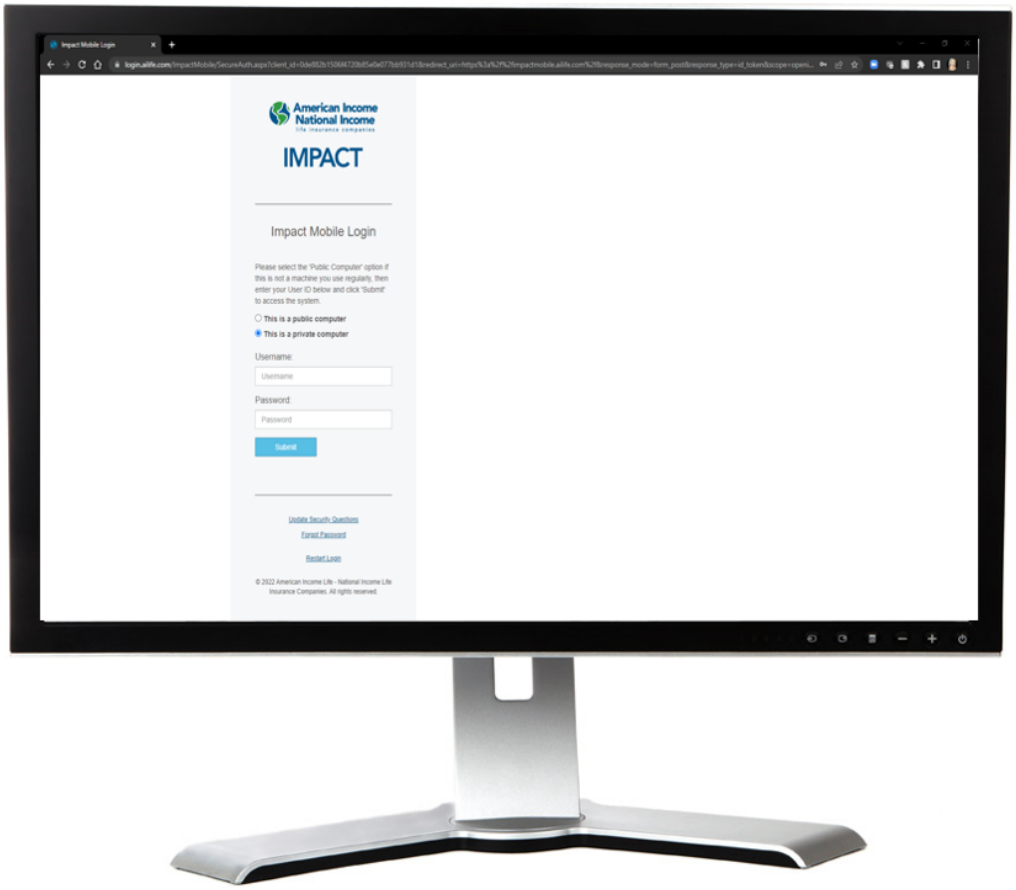
Currently you must submit one approval at a time.

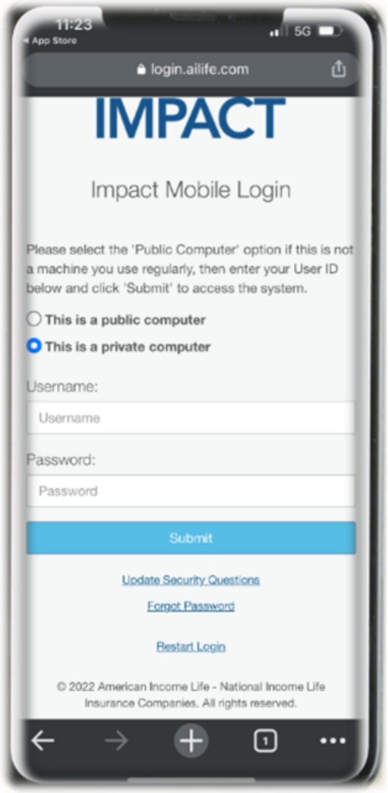
3.2.6. My Conservation and MODs (Copy)

Conservation and Mods- Video Walk Thru (coming Soon)

Log into Impact **Mobile** on a computer or smart phone (Conservation and Mods is NOT in Impact Desktop)

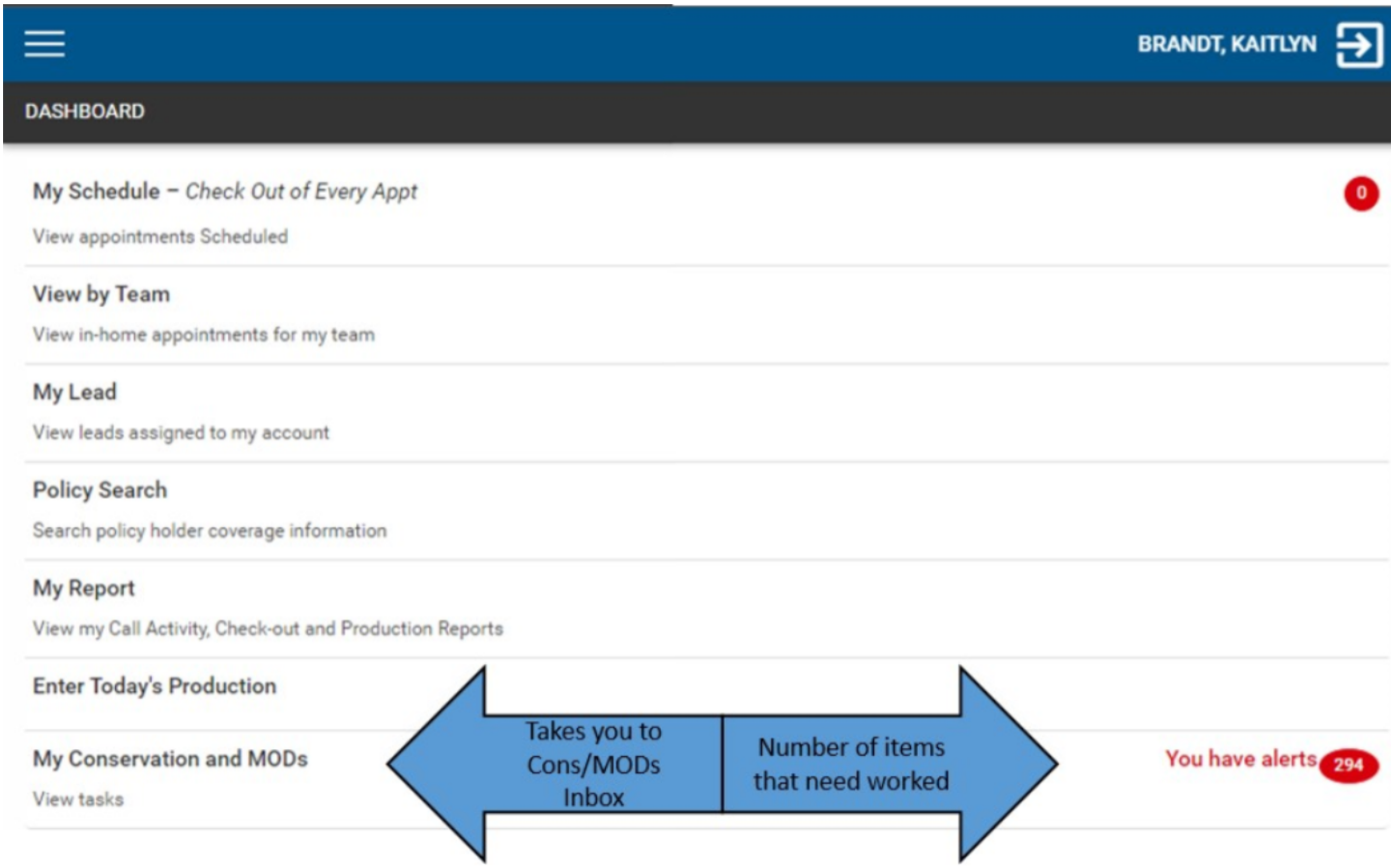
- https://Impactmobile.ailife.com





3.2.6.1. How to Read the Dashboard

How to Read the Dashboard- On the dashboard you will be able to see how many active assigned items you have to work and can access your in-box by clicking My Conservation and MODs



3.2.6.2. Your In Box

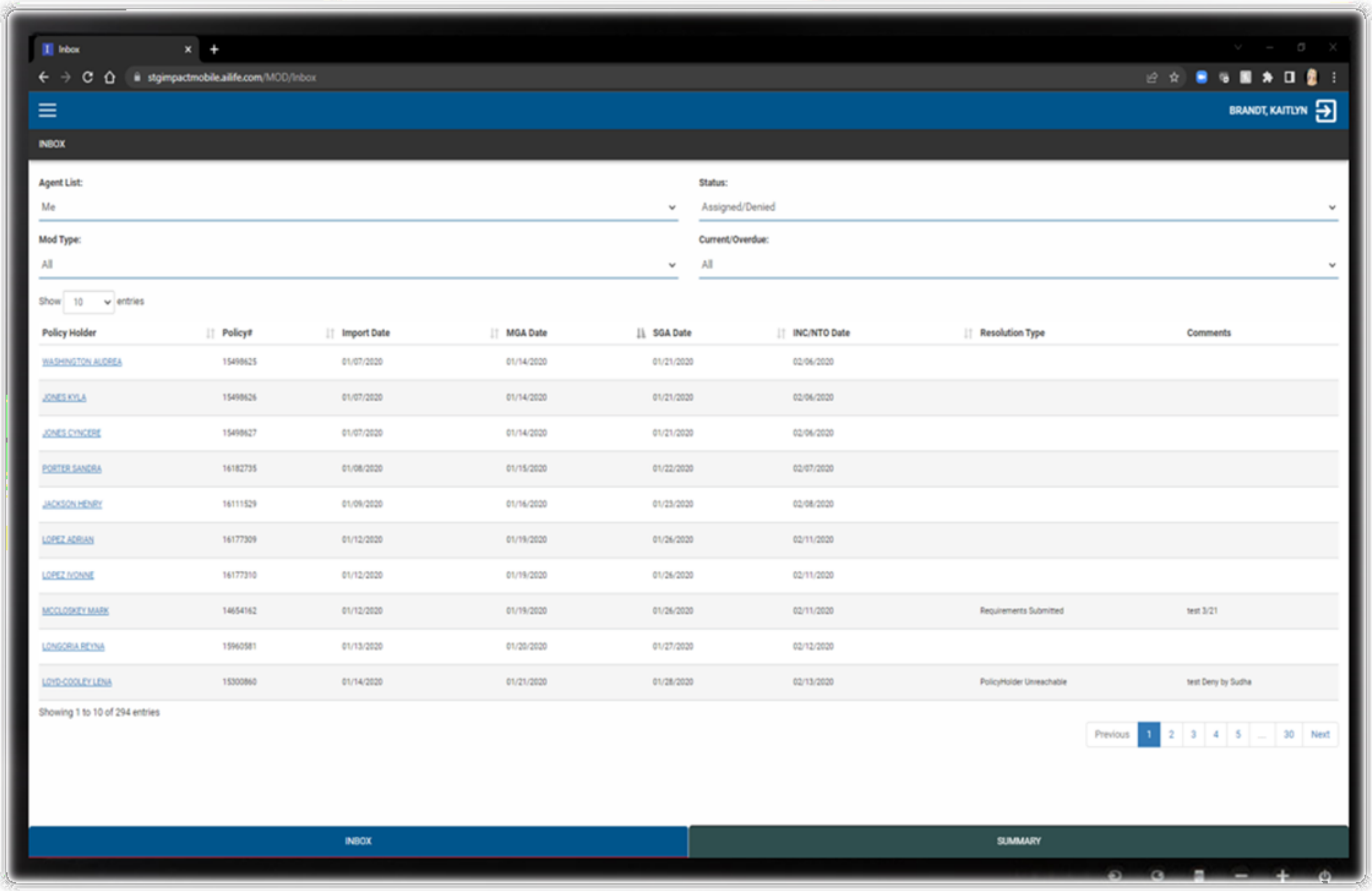
The in box will automatically open to these filters:

- **Agent list** - Me
- **Status** - Assigned/Denied
- **Mod Type** - All
- **Current/Overdue** - All
- Default view of 10 assignments

  - You will be able to expand this to see 10, 25, 50, or 100 items at a time.
  - You will see the
    - Policy Holders Name
    - Policy Number
    - Import Date

- MGA Date
- SGA Date
- INC/NTO Date
- Resolution Type
- Comments

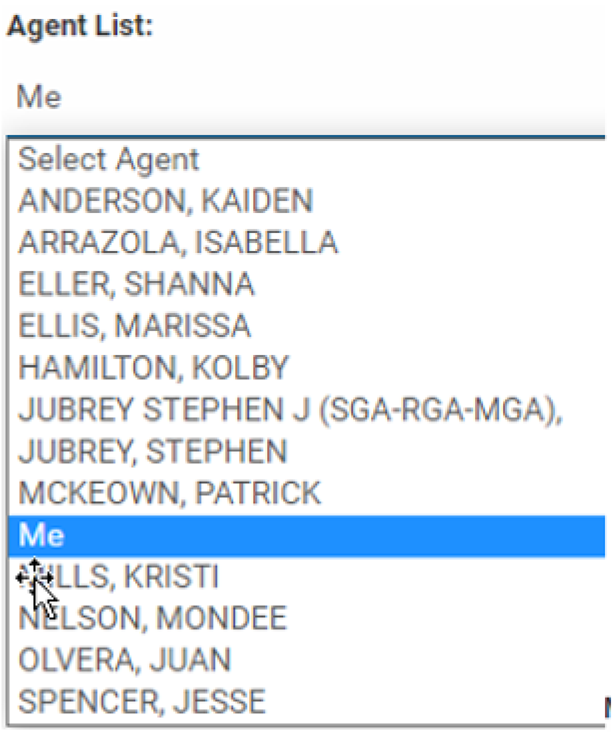
You will click on the Hyper Linked Policy Holder Name to see and review the details needed to work the conservation or MOD letter



3.2.6.3. Filters Defined

There are 4 filter options for your Conservation and MODs inbox

- **Agent List** – if you are in leadership this drop down menu will show all active agents in your hierarchy

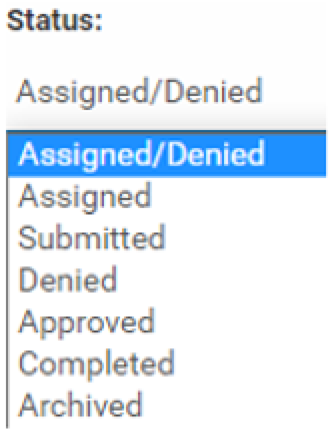


- **Status**
  - **Assigned/Denied**
    - All items that need attention. These will be new items and items that have been returned to you by your local Admin that need more attention and additional information. You will see a note from the Admin stating what else is required to complete this item.
  - **Assigned**
    - These are all new items that need attention and need to be worked and submitted to your local Admin through Impact.
  - **Submitted**
    - These are all items that you as the field agent have worked and gathered the

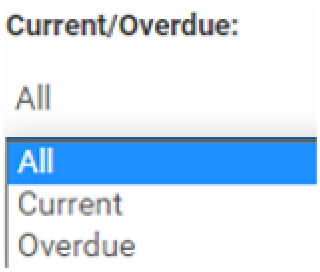
necessary requirements to continue processing and/or restoring the policy. You will be able to see any attachments/notes/phone calls that have been made.

- **Approved**
    - These items have been reviewed and approved by your Local Admin and are being processed with Home Office (whatever department is necessary for completion of the policy).
- **Completed**
    - These are items that you have submitted everything required to your local Admin and they have processed through Home Office and is now in a Normal Premium Paying and/or true cancelation status.
- **Archived**
    - These are all items that have been completed and are kept for record for the Local Agency.

- ation. Please make sure to look through all letters and identify so you are able to work correctly. Letters that are in another language may also be assigned through MISC letters.



- **Current/Overdue**
  - **All**
    - These are all items new and old
  - **Current**
    - These are all items that have not surpassed the INC/NTO date
  - **Overdue**
    - These are all items that have surpassed the INC/NTO date



3.2.6.4. Mod Type Definitions

MOD Type Definitions

- **All**
  - These are all items that are imported to Impact daily

- **MODs**
    - These items require one or a combination of a Signed Amendment/RT-99/COD – needing an agreement and most time a signature from the client (placing a rating at delivery of policy)
- **Underwriting Bulletin**
    - These are actions where agent help is needed i.e. Scheduling a medical exam/ doing a prescription verification or an interview with an underwriter/ having an additional addendum or questionnaire filled out/ conducting a 1-800 call/ obtaining medical records (APS)/ or oral swab (for in person sales)
- **Bad Check Alert**
    - These letters are a notice that the draft for a new application has come back as unable to be paid. This will require new banking information to continue processing the application.
- **Returned Items**
    - These letters generate when a policy that has been issued has missed a payment you will need to obtain either new banking information or verify that it is okay to redraft the same account and submit the

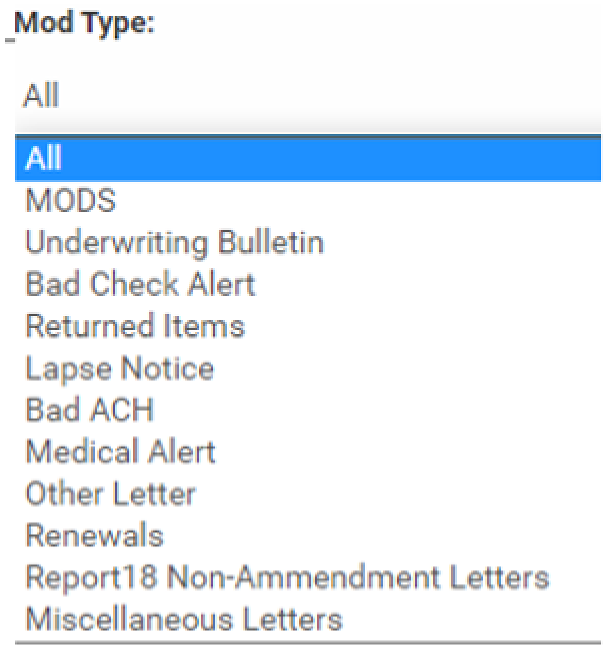
required paperwork.

- **Lapse Notice**
  - These are also known as 40 or 45 day notices. These notices are generated when a policy holder has missed a payment and the policy is now outside of its grace period. You will need to obtain the paper work necessary and signatures as needed to reinstate the case.

- **Bad ACH**
  - These letters are generated for new business applications that have come back with the initial payment unpaid. You will want to reach out to the client and let them know that the initial draft for their application was redeposited and we will try and draft in the next 7-10 business days. If a different bank account is to be used please fill out the required paperwork for your Admin to process.
- **Medical Alert – This is being removed disregard this folder.**
- **Other Letter**
  - Any of the above or below letters could fall into the other letter category if there is a difference in formatting of the letter or

placement of information. Please make sure to look through all letters and identify so you are able to work correctly. You will also see copies of the notices that are sent to clients in here so you have them for record.

- **Renewals**
    - These are copies of notices that are sent to clients that they have a type of coverage that is up for a renewal date and/or add on date. IE – Child Rider (life and/or A&H 21st birthday conversion)/ GIO/ Renewable and Convertible term coverage
- **Report 18 Non-Amendment Letters – This is being removed disregard this folder.**
- **Miscellaneous Letters**
    - These letters are assigned to you by your admin these will include pending reinstatements and policy address updates.
    - These may also include any of the above letters could be in this folder if there is a difference in formatting of the letter or placement of inform



3.2.6.5. In Box Columns

In your inbox there are 6 identifying columns for each item

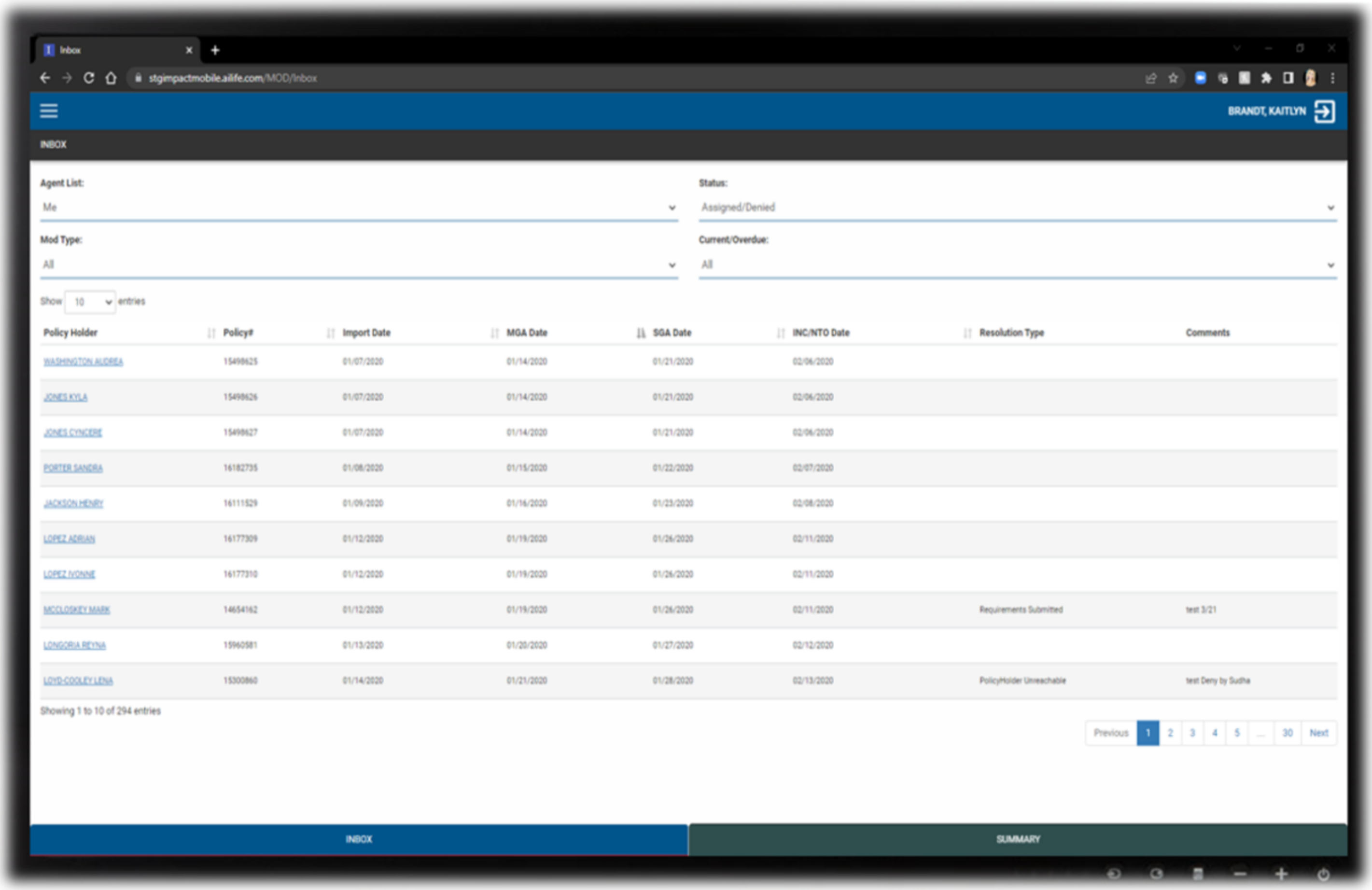
- **Import Date**
  - This is the date that the item was generated and imported into Impact for you to start working.
- **MGA Date**
  - This is the date selected by your SGA/Agency Owner that a copy of your Conservation/MOD item will automatically share with your MGA. You and your MGA will both have a copy of the item and be able to work at the same time. If your MGA completes before you the case may be subject to recoding (speak with your MGA/RGA/SGA for individual office guidelines.)
- **SGA Date**
  - This is the date selected by your SGA/Agency

Owner that a copy of your Conservation/MOD item will be shared with an Agency Conservation Specialist(s). The case may either be shared with the Conservation Specialist(s) or reassigned away from the writing agent. If the Conservation Specialist completes before you the case may be subject to recoding (speak with your MGA/RGA/SGA for individual office guidelines.)

- **INC/NTO Date**
  - This is the date assigned by Underwriting and/or Policy Issue that the requirements must be completed and submitted to the correct department by or the case will not issue and will cause a charge back on advance. If a case is completed by obtaining the requirements needed after this date the correct paper work to Reopen the case will be required alongside any MODs or Underwriting Bulletins.
  - These cases may and most times will be reassigned to an Agency Conservation Specialist and upon fixing the case are subject to recoding (speak with your MGA/RGA/SGA for individual office guidelines.)
- **Resolution Type**
  - A case that has previously been submitted to the Agency Admin for processing and has be Denied OR has been submitted will show how

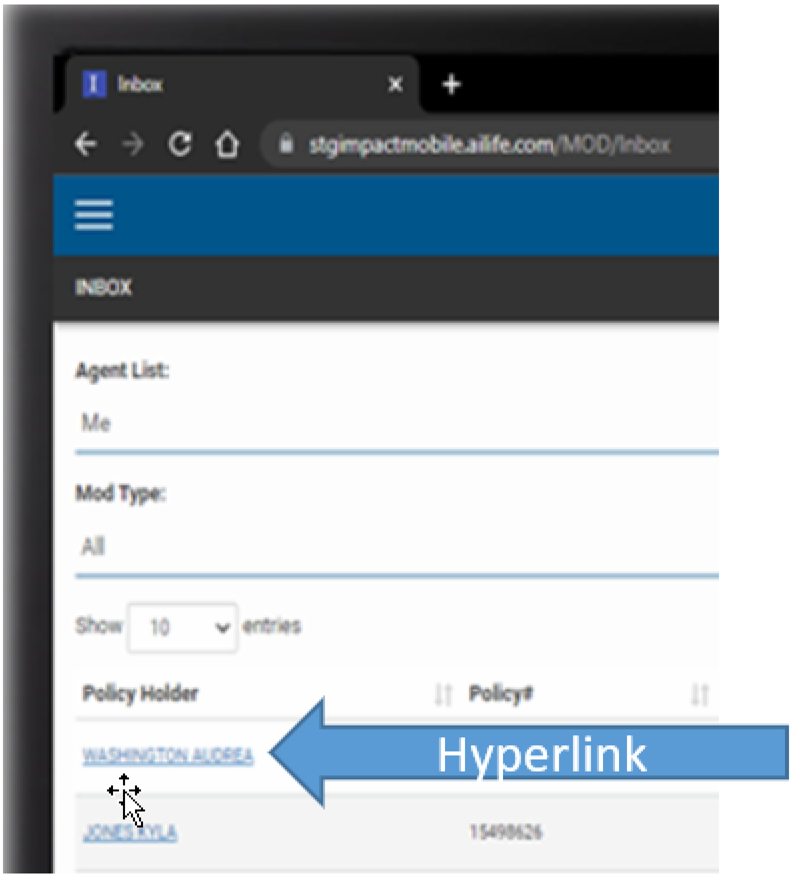
the case was resolve upon submitting.

- **Comments**
  - Comments that are added when submitting an item to an admin OR a case that has been denied by the admin will show. The most recent comment that has been added will be the default view.



3.2.6.6. Individual Item Display Screen

From the inbox screen clicking on the hyper linked policy holder name it will bring you to a policy overview.

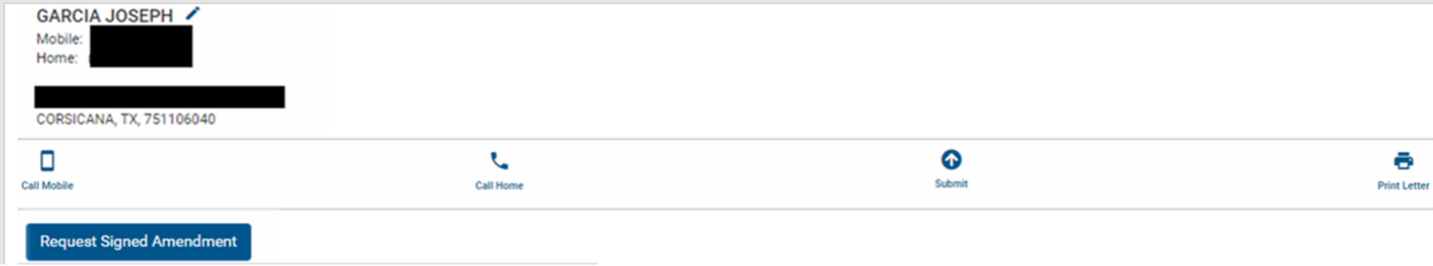


You will have the option for the below functions

- Edit policy holder phone numbers
- Call mobile- This will be recorded and logged
- Call home- This will be recorded and logged

- Submit the needed requirements
- Print the letter (download) that will need a signature or you need to be able to complete the action required
- Request signed amendment if not attached in print

letter



The display screen that you see is what is known as the “Cover Letter” split into 5 sections – or the information needed to place the correct requirements as required by PI to complete the policy issuing process

Policy Info	
Policy#	17596128
MOD Type	MODS
Import Date	05/13/2022
Complete By	05/16/2022
Action	
Needed	Prem Miscalc,Signed Amendment
Primary Rated	Yes
Other	$5K WLUW AND MEDICAL RECORDS DATED 8/2/21
Amount	
COD	$44.60
RT99	
Refund	
Rating	
Primary Rated	Yes
Spouse Rated	No
Reason	Resp,Weight
Other	
Misc	
Source of Info	Doctor,Qair
Abnormal	
Deleted	10 Yr R&C,ADB/2000,TIR
Reduced Face	False
Question	
Reason for Delete	
Person(s)	

Policy Info

- **Hyper-Linked policy number**
  - This will allow you to view the details of

the policy such as coverage amounts like a typical policy overview screen you would see in Impact when you are assigned a policy holder as a lead. As well as any associated household policies

- **MOD Type**
    - This will tell you what letter type needs to be worked
- **Import Date**
    - This is the date that the item loaded into Impact
- **Complete By**
    - This is the date that you will need to complete the requirements by

- **Action**
- **Needed**
    - This will list the requirements you will need to obtain from the client i.e. Signed amendment, RT-99, COD
- **Primary rated**
    - This will say yes or no based off of if Underwriting has assigned a rating to the coverage or not
- **Other**
    - This will provide a brief description with regards to actions taken by or information

gathered by underwriting that led to the risk classification assignment I.E. medical records, exam, questionnaires, previous applications and or current policies

- **Amount**
    - **COD**
        - Collect On Delivery – this is the difference between the quoted premium and new premium with the risk classification added in.
    - **RT-99**
        - This will tell you the reduction in coverage if an RT-99 is offered
    - **Refund**
        - This will tell you the amount returned to the client in the case that only a reduced counter offer is made to the client that is less in premium than the original quoted amount
- **Rating**
    - **Primary rated**
        - This will say yes or no based off of if Underwriting has assigned a rating to the coverage or not
    - **Spouse rated**
        - This will say yes or no based off of if

Underwriting has assigned a rating to the coverage or not if the spouse also applied for coverage

- **Reason**
  - this will give a description as to the reason that the client has received the risk classification
- **Other**
  - This is any additional information needed to properly explain the adjusted coverage or premium to the client

▪ **Misc**

- **Source of Info**
  - This will state where the information was obtain from that underwriting used to make their decision I.E. Doctor. Qair. ETC.
- **Abnormal**
  - If an exam was conducted and the tests came back abnormal
- **Deleted**
  - This will state if coverage has been deleted due to underwriting action and the addition of a risk classification
- **Reduced Face**
  - This will say true or false if the face amount of the policy (coverage amount) has been

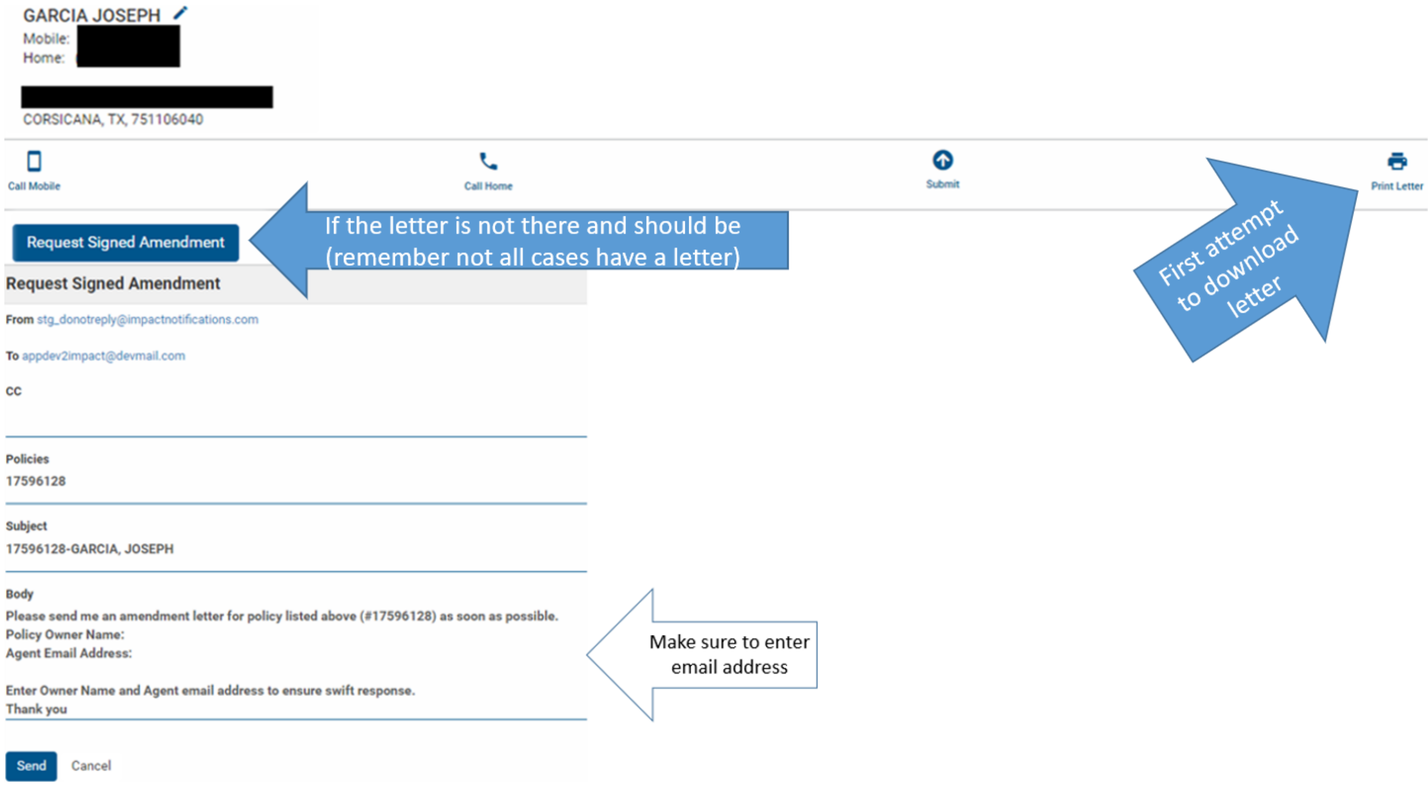
reduced

- Question
- Reason for Delete
- Person(s)

3.2.6.7. How to Request a Missing Signed Amendment or RT-99

Requesting a missing signed amendment

- If you click on print letter and it says there is no MOD available your next step will be to click on the Blue Request Signed Amendment button
- This will bring up a new screen that has a format of an email – with some prepopulated fields
  - Sending email
  - To email
  - Policy number
  - Subject – Automatically policy number and insured name
  - Body of the email
    - *you will need to input your email where it says agent email address*



Example of attached letters needed to work Conservation/MOD item

MODIFICATIONS
ATTACHED TO AND FORMING A PART OF POLICY NUMBER 17596128.

THE PROVISIONS CONTAINED HEREIN TO TAKE EFFECT AS OF THE DATE OF ISSUE UNLESS A DIFFERENT DATE IS SHOWN HEREIN.

THE APPLICATION FOR THIS POLICY IS HEREBY AMENDED AS FOLLOWS:

THE PREMIUM AMOUNT INCLUDES AN ADDITIONAL RISK CLASSIFICATION PREMIUM.

10YR RENEW/CONVERT LEVEL,ACCIDENT DEATH BENEFIT,TERMINAL ILLNESS RIDER IS / ARE EXCLUDED FROM THIS PLAN.

THE CORRECT FACE AMOUNT OF WHOLE LIFE INSURANCE IS $5,000.

IN ALL OTHER RESPECTS THE PROVISIONS AND CONDITIONS OF THE POLICY REMAIN THE SAME.

AMERICAN INCOME LIFE INSURANCE COMPANY
WACO, TEXAS

I HEREBY AGREE THAT THESE CHANGES SHALL BE AN AMENDMENT TO AND FORM A PART OF THE ORIGINAL APPLICATION AND OF THE POLICY ISSUED THEREUNDER AND THAT THEY SHALL BE BINDING ON ANY PERSON WHO SHALL HAVE OR CLAIM ANY INTEREST UNDER SUCH POLICY.

SIGNATURE OF POLICY OWNER DATE SIGNED

April 11, 2022

#BWNMKRW
#0017 5961 28/2#
Joseph Garcia
[redacted]

Application Number 17596128 Insured's Name Joseph Garcia

We have almost completed action on your request for insurance, but must come to you for help. We mailed the policy to our representative and the coverage we are offering you is stated in that policy. To put the coverage into effect, we need your signature on an amendment and your check in the amount of $ 44.60.

The agent will be contacting you shortly. Enclosed is a copy of the original amendment. If you would like to secure coverage immediately, just sign the amendment and return it to us, along with your check, in the enclosed envelope. It is important that we receive them within the next fourteen (14) days.

If you have any questions, or if we can be of help in any way, please let us know.

Patty Ingram
Policy Issue Department

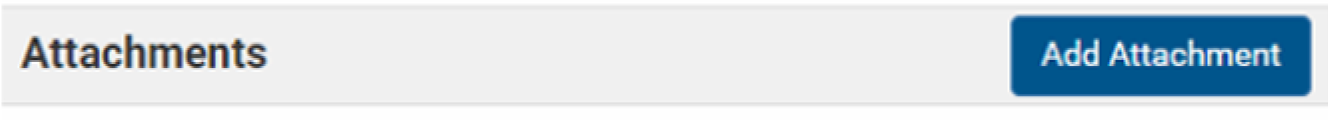
P.S. Please write your application number on the check or money order

CC [redacted] PI/TAB IC PIAMCD

3.2.6.8. How to submit your conservation items and adding an attachment

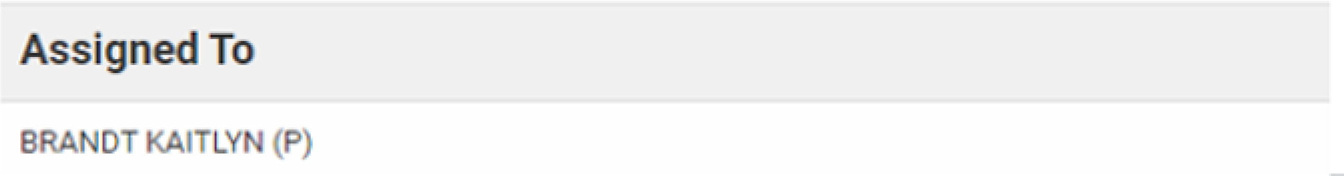
Submitting the requirements once obtained (resolving the Conservation/MOD notice)

- When submitting the requirements needed for a conservation/MOD item the first thing you should do is attach any documents that have been obtained and are required by your office and policy issue to complete the policy.

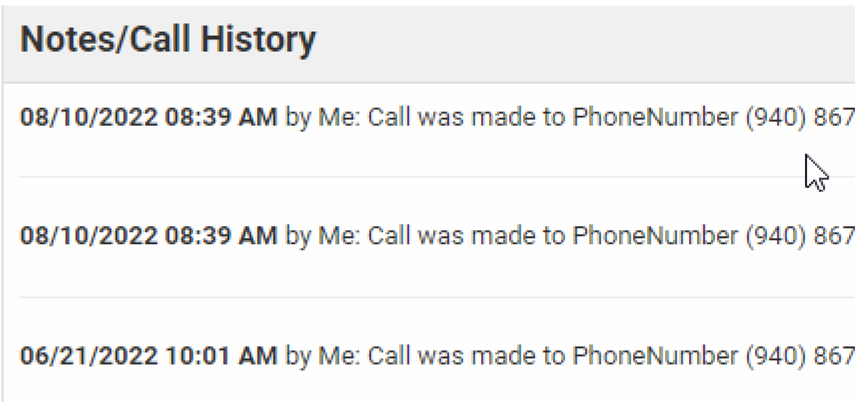


- The accepted formats for attachments are
    - .jpeg
    - .jpg
    - .png
    - .gif
    - .bmp
    - .pdf

- You will be able to see everyone who is assigned to work on each notification.



- Any and all actions taken on a not in Conservation and MODs will be noted becoming part of this permanent record. This will include
    - Time of action
    - Date of action
    - Person conducting the action
        - Call made
        - Note added
        - Apt set
        - Attachment uploaded
        - Resolution selected



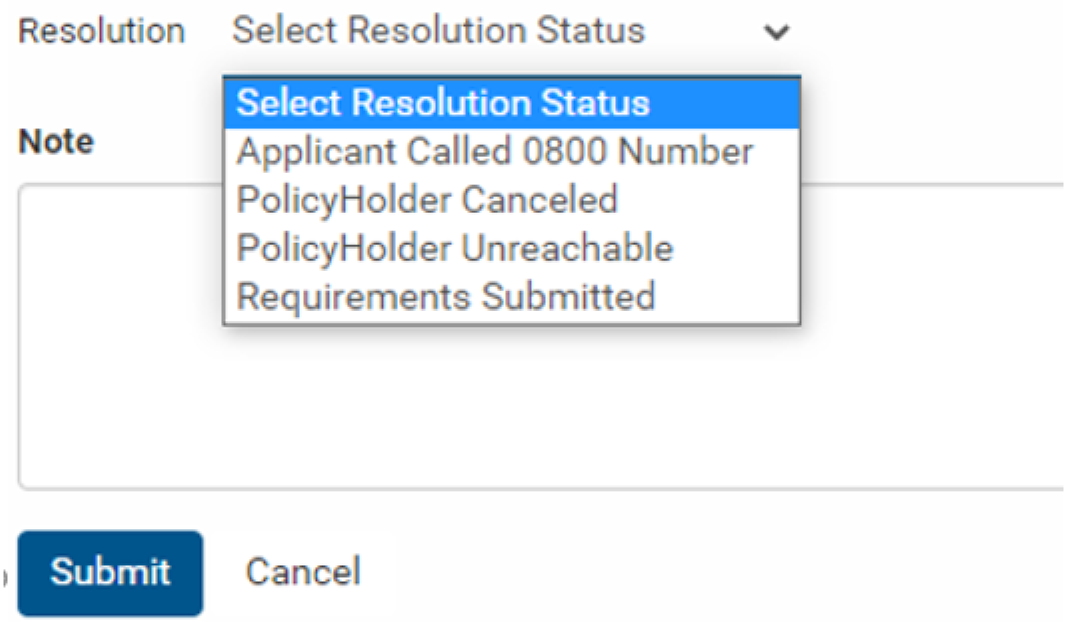
3.2.6.9. Resolutions

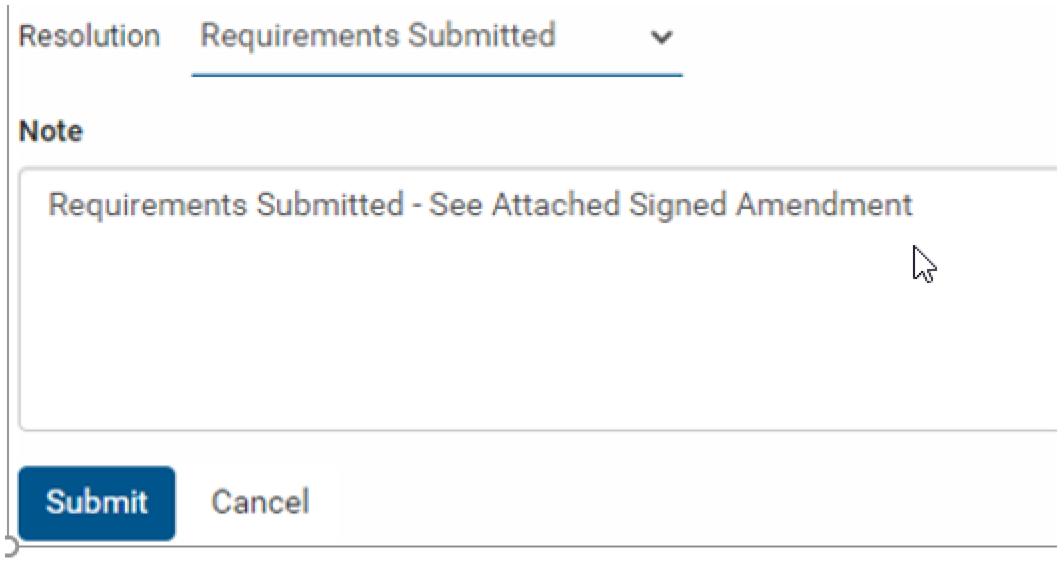
Selecting a resolution

- **Applicant called 0800 number**
  - You should select this resolution status if you had an underwriting bulletin stating that the client needs to call the 800 number. After you have spoken with the client and have confirmation this action has been taken.
  - Please ensure to add a note with the details of when the client completed the call day and time and any additional information they provide.
- **PolicyHolder Cancel**
  - You should select this resolution status if you have spoken directly with the client and they wish to no longer move forward with the application process and policy.
  - Please ensure to add a note with the details of why the client is wishing to cancel i.e.
    - Can no longer afford
    - Found coverage elsewhere
    - Refusal due to rating (premium increase is too much)
    - Decrease of coverage (due to risk classification)

- Refusal of medical exam

- **PolicyHolder Unreachable**
  - You should select this resolution status if you have tried multiple methods of contacting the policy holder and are unsuccessful such as
    - Calling
    - Texting
    - Emailing
    - Door knocking
    - Reaching out on social media
- **Requirements Submitted**
  - You should select this resolution status if you have spoken with the client and obtained everything that is required to complete the issuing process of the policy.
  - Please make sure to attach all documents necessary and add a note for your agencies admin with what has been attached and who you spoke with in the household.



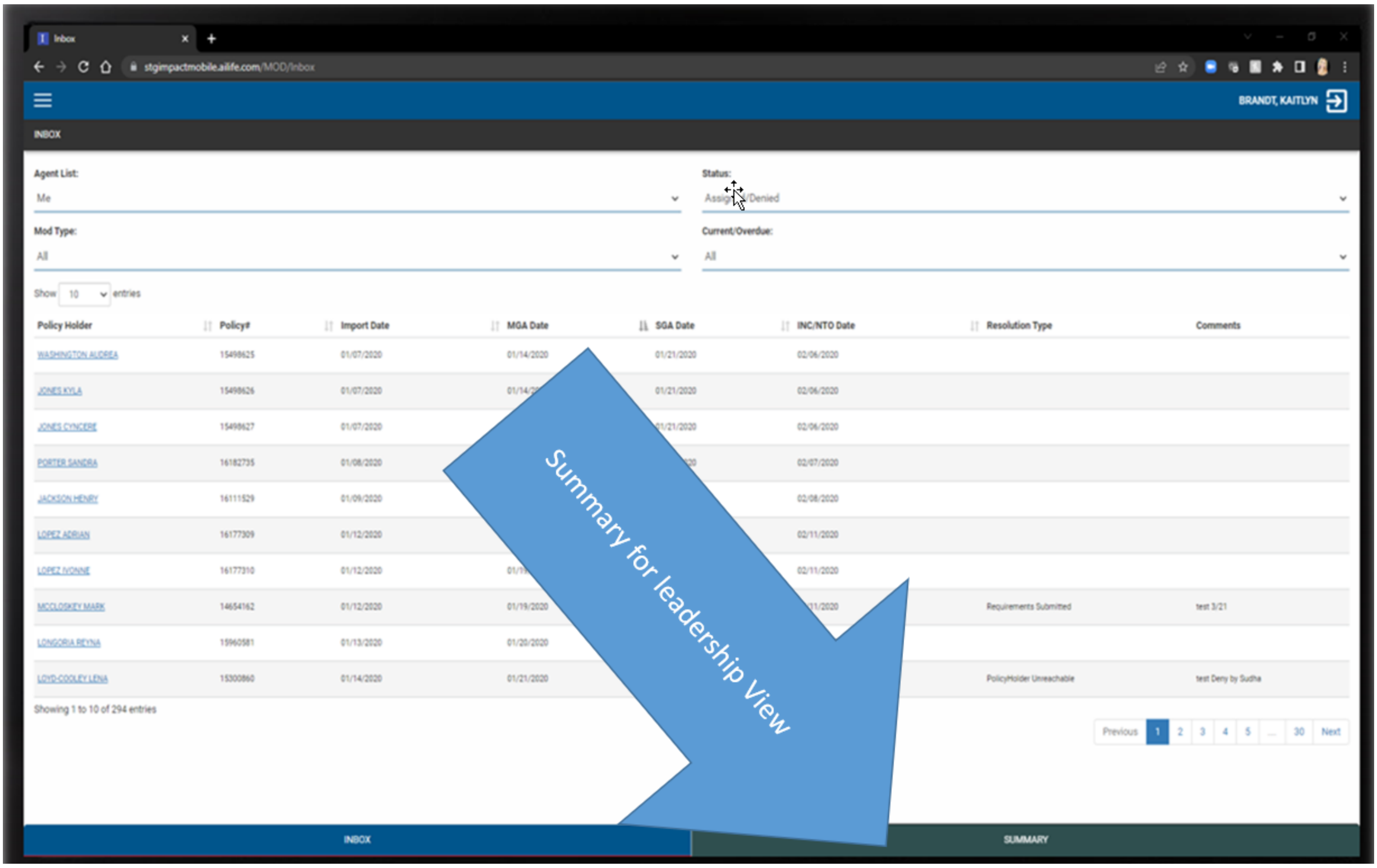


Once you have selected the correct resolution and added notes accordingly click on submit and a box will pop up stating that the MOD has been successfully submitted. This means that the Conservation/MOD item has been submitted for the agency admin to review and process.

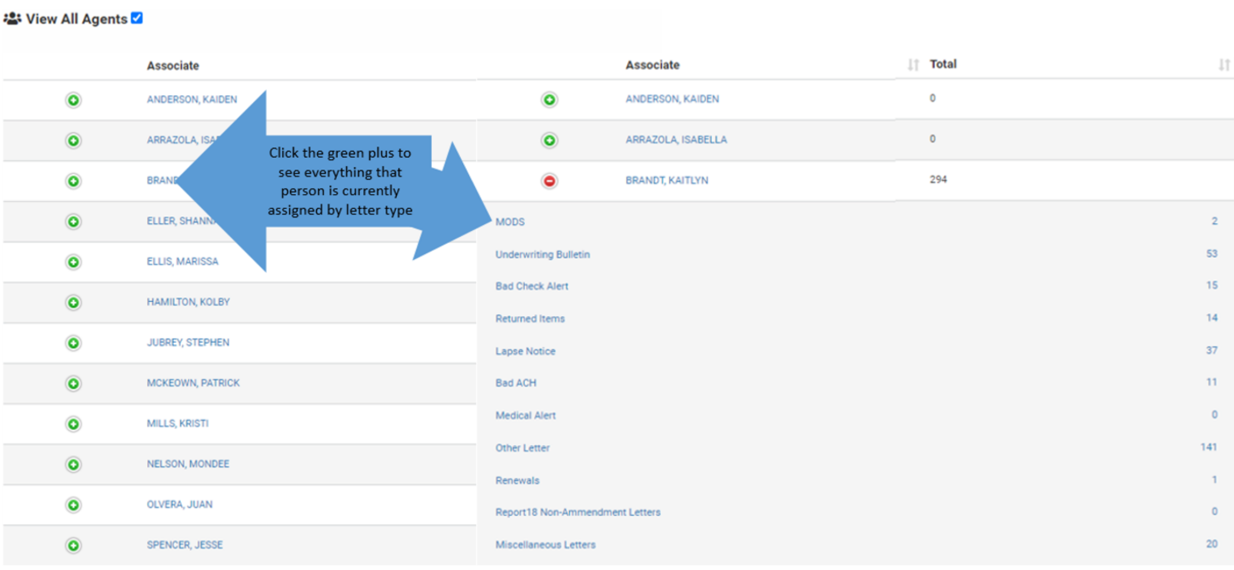
3.2.6.10. Leadership Team Summary

Leadership TEAM summary

- If you are in leadership you have the ability to look at your entire TEAMs assignments in one snap shot. At the bottom of your inbox there is a tab named summary once you click on that it will bring you to a new page.



Once on the new screen you will click the box beside View All Agents

- It will list every member of your TEAM with a green plus beside their name.
- Click on the plus to expand the section under that TEAMmember and you will see by letter type how many assignments that person has.
- 

3.2.7. Change Password

This will allow you to change your password for Impact Mobile and the Impact Portal.

Impact Portal- https://impact.ailife.com

Impact Mobile- https://impactmobile.com

American Income
National Income
life insurance companies

IMPACT

Impact Mobile Password Reset

Please enter your UserID below.

Username:

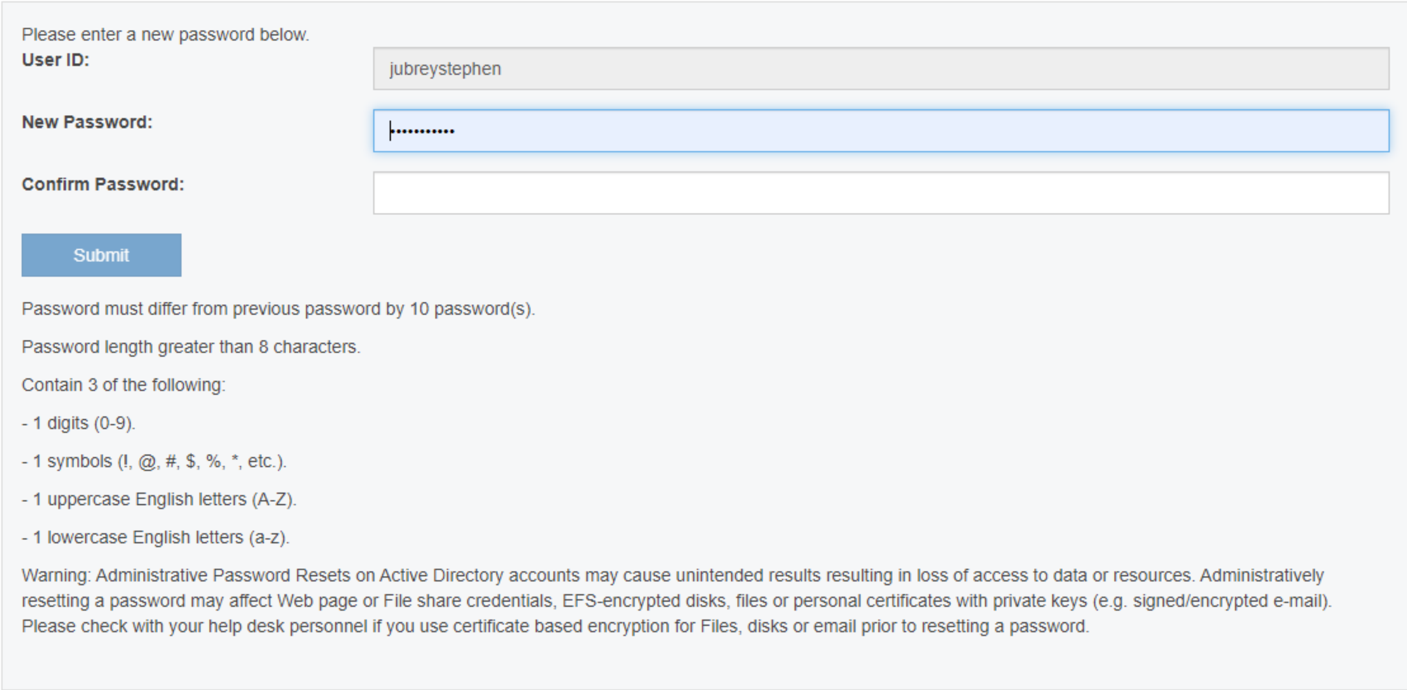
jubreystephen

Submit

Restart Login

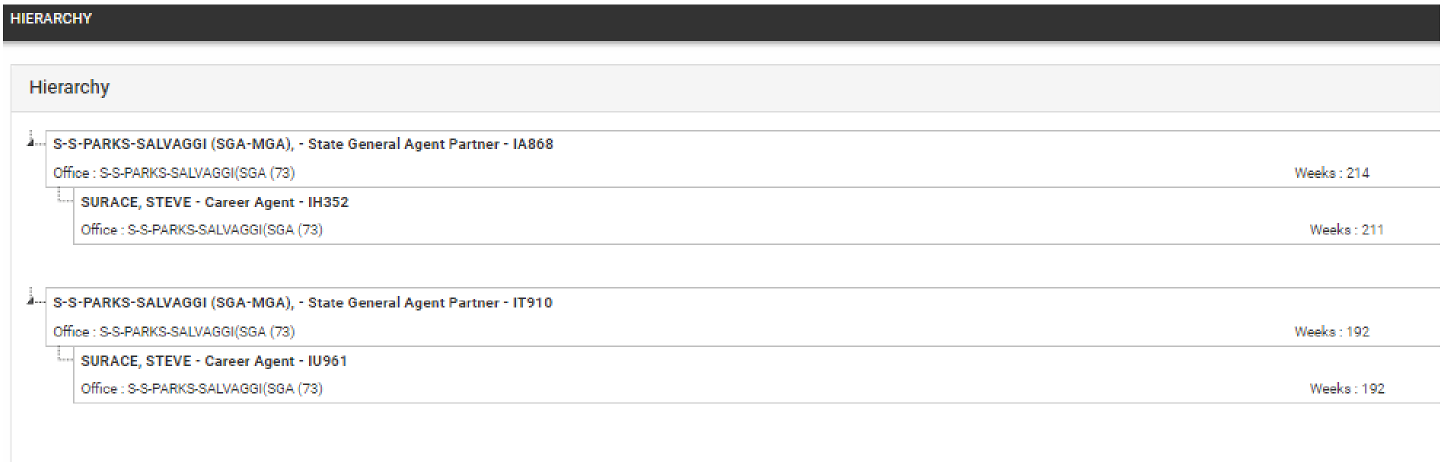
Please choose the delivery method for your Passcode.

● Phone/Mobile xxx-xxx-0835	○ Voice ● SMS/Text
○ Phone/Mobile xxx-xxx-0835	○ Voice ○ SMS/Text
○ Email xxxxx@aildfw.com	



3.2.8. My Info

This screen will list your current hierarchy and your agent number(s).



3.3. Dashboard

Dashboard: In your Mobile dashboard your can access the following

My Schedule - You can access your scheduled appointments and call backs. From this screen you can view the lead, call the lead, send a reminder text and check out of your appointment.

My Lead-

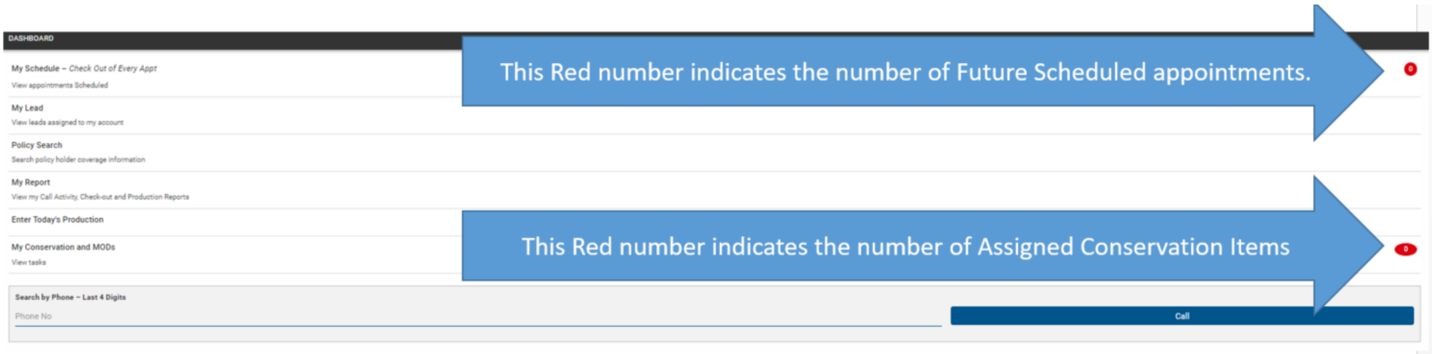
Policy Search

My Report

Enter Today's Production

My Conservation and MODs

Search by phone - last 4 digits



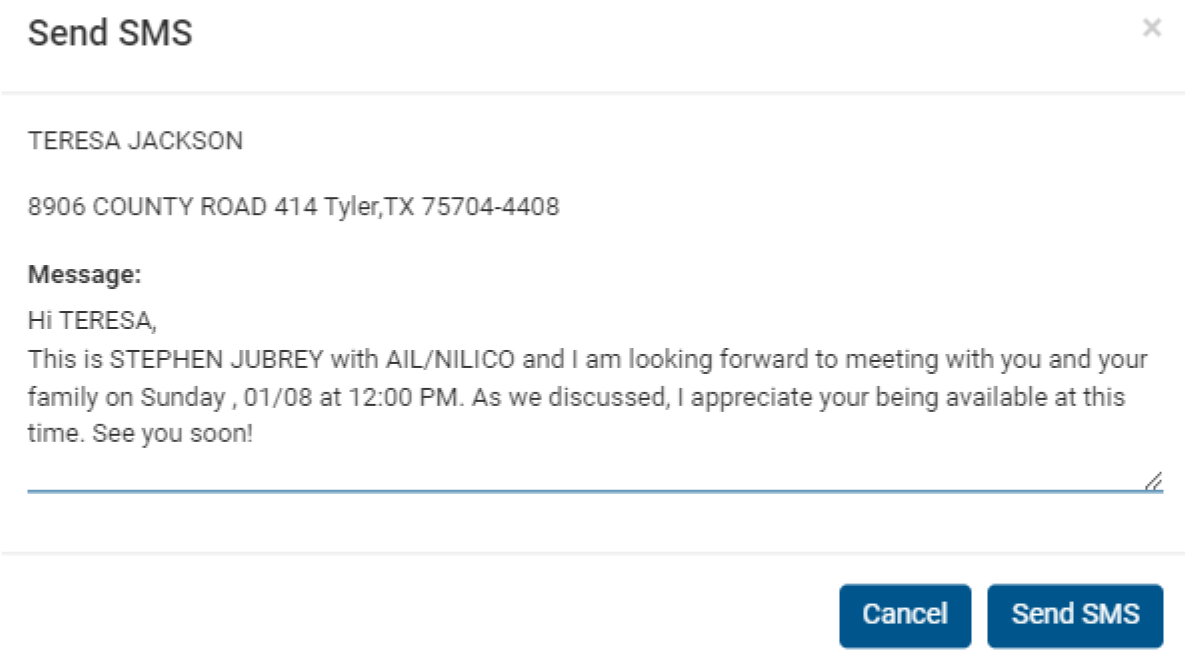
3.3.1. My Schedule

From the Dashboard, a Red indicator bubble with a number will indicate how many future set appointments. This does NOT include dropbys or call backs.

When 'My Schedule' is selected, your schedule will expand to show all scheduled appointments, call backs and drop bys.

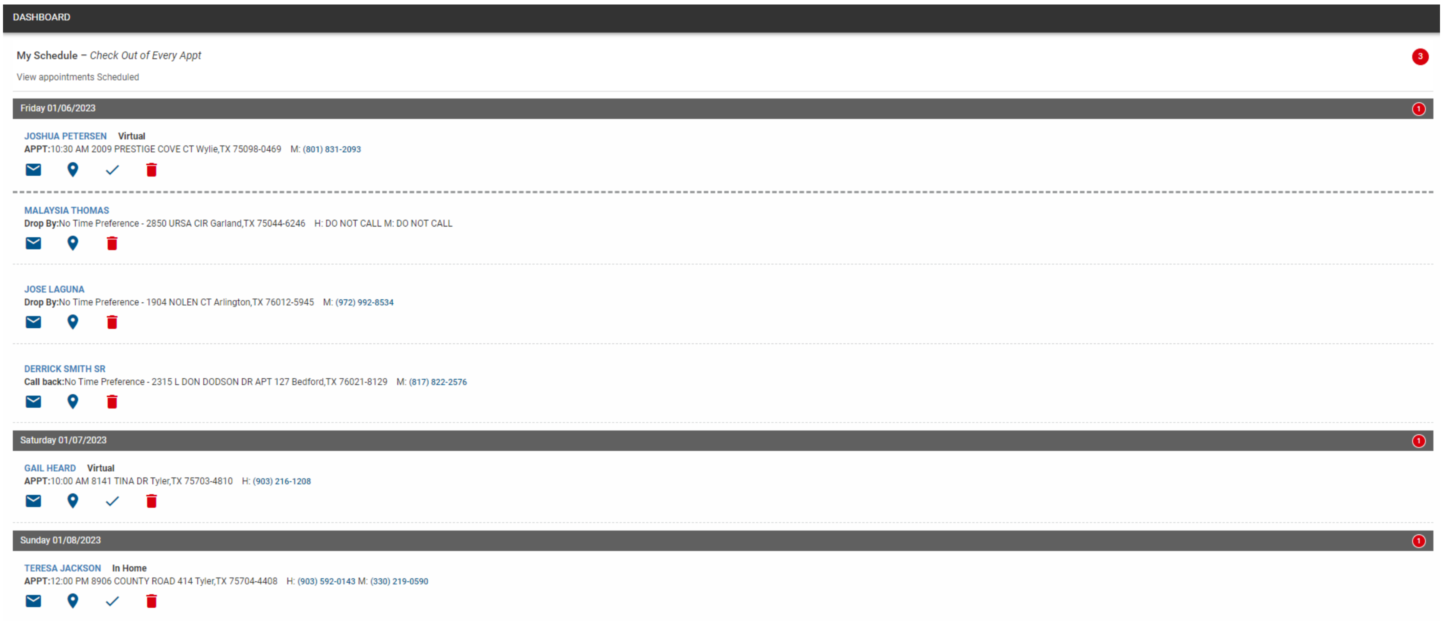
From this view you have the following selections:

- Select the clients name to open the lead view
- Select the envelope to send a reminder text. Pro-Tip: use this every morning to remind the clients of the current days appointment. This can be edited and currently does NOT use your Impact Preferences. You can add your zoom link if necessary.



- Select the Pinpoint to plot the appointment in your map program. From here you can get directions and navigate.
-
- Select the Checkout to resolve the lead. This should be done at the completion of the current presentation.
-

- Do Not Use the  Trash Can. This is being removed as an option.



3.3.2. View by Team

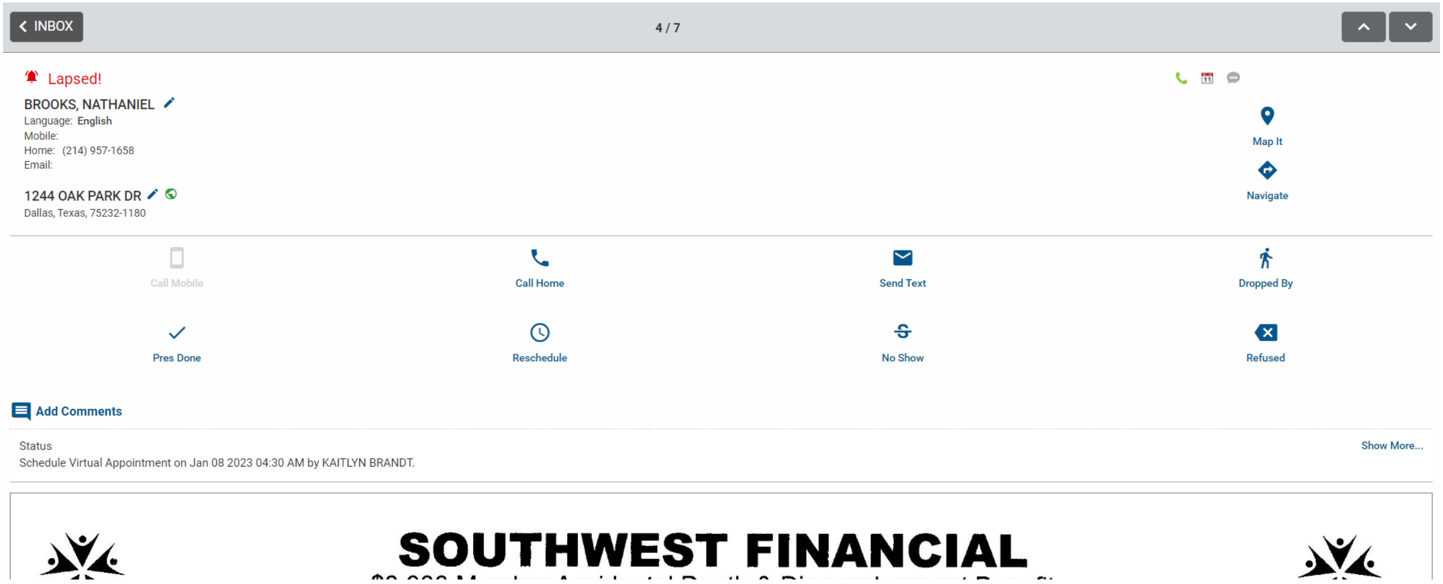
From View by Team you can view the total amount of appointments set for future dates and times scheduled for you and your assigned agents in your direct hierarchy.

You will see a grand total and a daily total.

Each day is expandable to view all agents individual number of scheduled appointments.

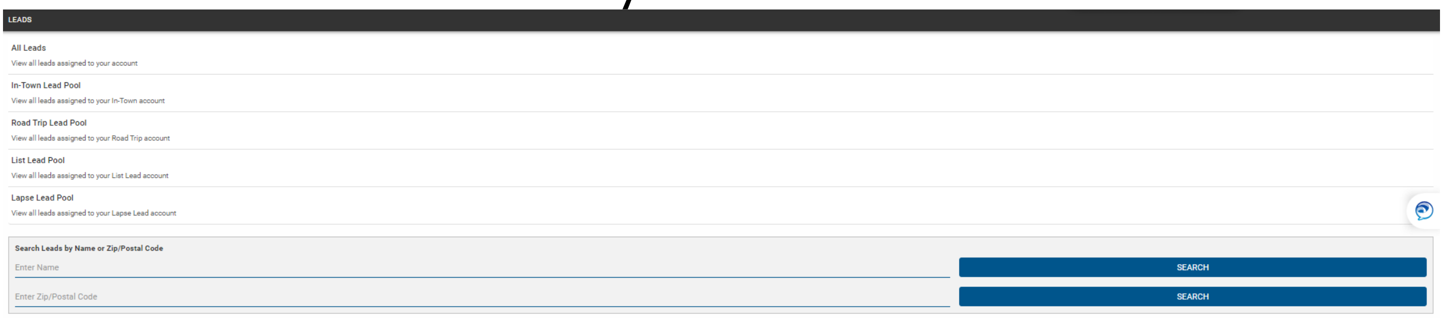
You can then expand each agent to view their appointment names and times

You can also select the hyper linked name of the lead to view the detailed lead screen.



3.3.3. My Lead

The Lead button will take you to the Leads Section.



From here you can access your leads and view any leads assigned to your assigned team. You can also navigate directly to one of the 4 Lead Pools. A lead pool is a virtual folder that can be utilized to sort your leads from your SGA or Agency Lead Administrator.

Even though the 4 folders are named, your agency can utilize them however they see fit.

All referrals collected from eApp will automatically distribute to the In-Town Lead Pool.   When an agent performs an On line Update in eApp, the referrals will process through the combined feature and also a address and phone number append. Due to these processes it may take 30-60 minutes for the referral to appear in Impact after the eApp On line update.

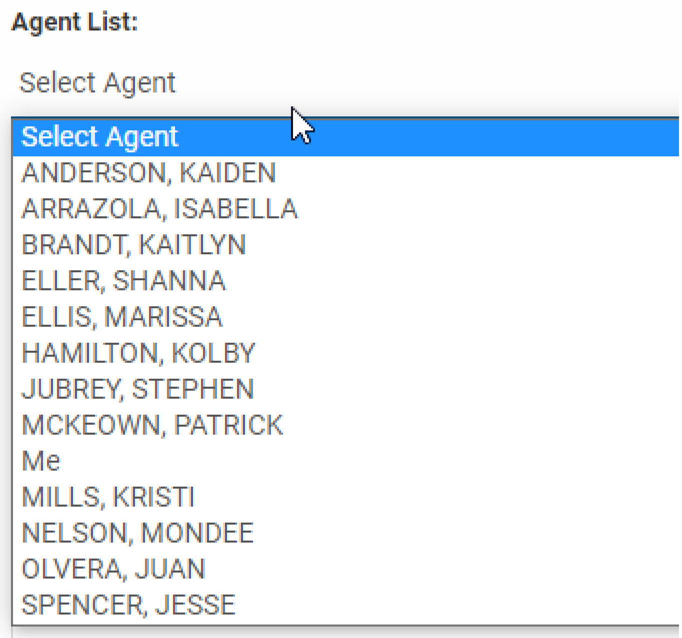
From the Main Lead Screen you can search for a lead in all lead pools by Name or Zip Code.

3.3.3.1. Lead Inbox

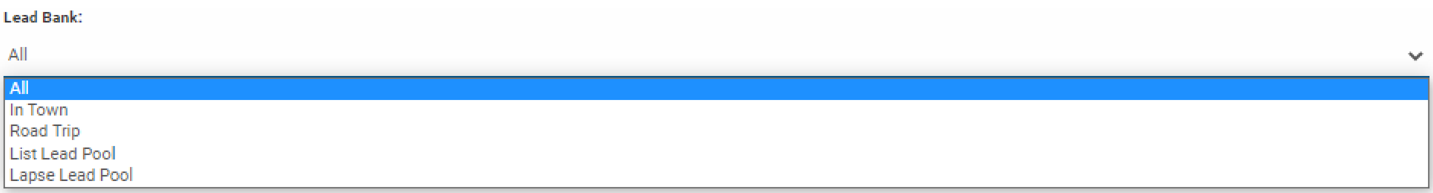
Lead In-box- the lead in-box is where you can locate your assigned leads.   From here you can sort and filter by many options. You can also view your assigned agents leads as well. From this screen when you select a lead, you will access the lead Detail call screen.

Filter Options: (Filter means to only show the selected criteria)

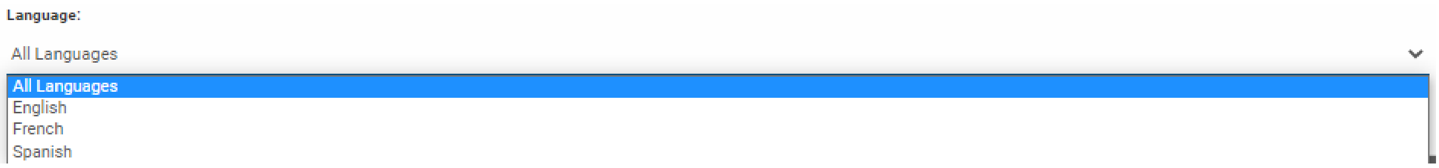
Agent List: This is where you can view your assigned agents and their assigned leads. (if Select Agent is selected, no resources will show)



Lead Bank: This is where you can isolate your leads base on the pool they were assigned to by your SGA or SGA Lead Administrator. Note: even though the pools are named, these can be used at your SGA's discretion. All referrals that the agent collected from eApp will be distributed automatically to the In Town Pool.



Language: This is where you can filter by the clients primary language. If the client has indicated a primary language on the original response or if the lead was previously assigned to an agent that could not communicate with the client do to the language barrier, the agent can change the language and then the SGA or lead admin can reassign to an agent that can speak the clients desired language. Currently we have 3 language choices, English, French and Spanish. If your client speaks another language and you cannot communicate with the client, we would recommend resolving as a miscellaneous lead and note the language the clients speaks.



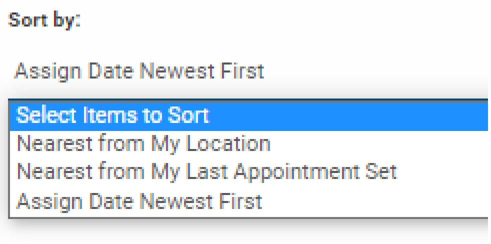
Sort Options- this option organizes lead in a particular order allowing for information to be found easier. This does NOT exclude data.

<u>Sort by:</u>

Assign Date Newest First: This will bring the leads that were assigned to you the most recently by your SGA or SGA Admin.

Nearest from my Location: This will sort by and bring the lead that is closest to your physical location to the top of the list. This is best used when you are actually in the field and NOT virtual. Your location services on your phone will need to be turned on for this to work properly. Note: the lead must be properly geocoded for this feature to work.

Nearest from my last appointment set: This will use the address of the most recent set appointment and bring the lead that is closest to it to the top of your lead list. This is best used when you are actually in the field and not virtual. This will help make your drive most efficient and help limit the miles between each appointment. Note: the lead must be properly geocoded for this feature to work.

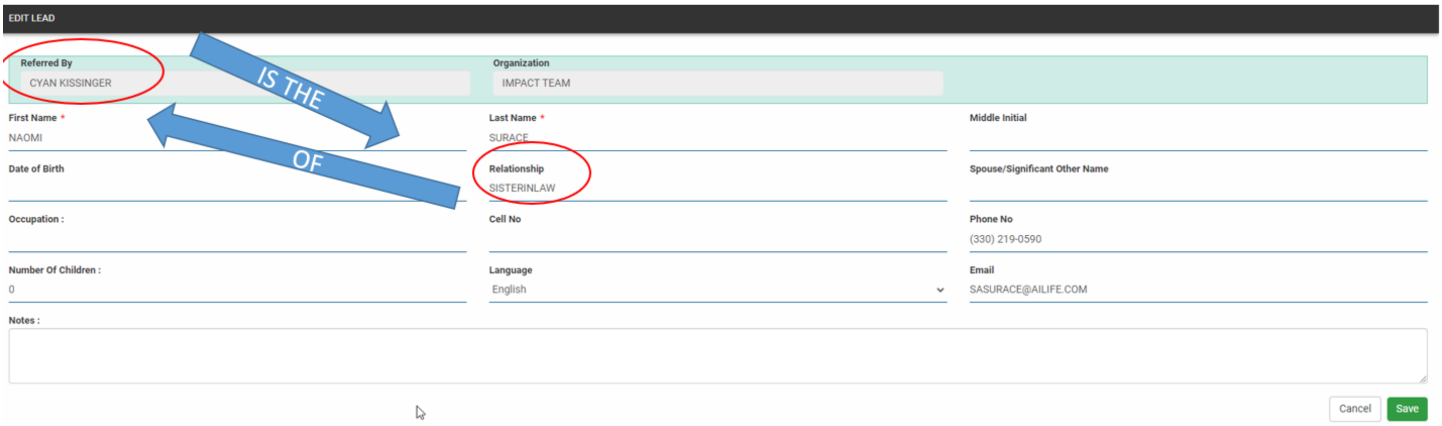


You can also use the Filter Arrows in the top row to arrange your leads by by city in:
City- Alphabetical order or Reverse alpha order
Zip Code- Numerical or reverse numerical order
Lead Type - (Response Card, Referral, POS, Lapse POS, List Lead)

3.3.3.1.1. Add Lead

From the Lead In-box - you can choose the Green Add Lead button. It is always preferred that all referrals are added in eApp, but when necessary you can add a lead from the lead in-box. All leads added from eApp are processed through a phone number/address update software prior to entering your lead inventory. This process does NOT happen if you add from Impact. Also if you add a referral from Impact, this data is NOT collected as a referral collected in Qlikview.

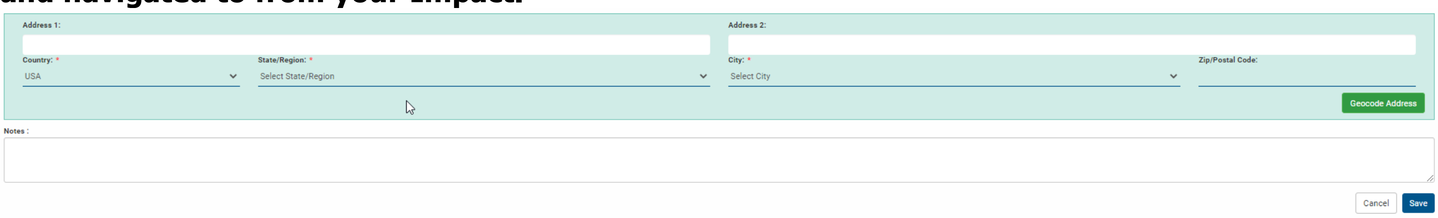
Hi NAOMI,
Your mother CYAN KISSINGER sponsored you for some No Cost benefits provided through American Income Life. I'd like to set a time to review these benefits as they requested and I'm available today. What's your availability when you get home from work? Thank you, Steve Surace Contact me at 330-219-0590



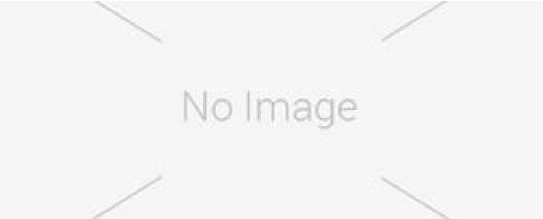
The relationship Field is the Relationship of the Referred by's relationship to the referral. For example: (Referred by) is the (Relationship) to (First Name) of Sponsor.

When a lead is added it may take up to 30-90 minutes to appear in your inventory. Prior to entering your lead inventory, the added lead must process through the combined feature first. **A lead added from Impact does NOT go through the address/phone number append software program. Best practices would be to add the lead in eApp then do an on line update so the lead runs through he address and phone append software and the referral is added to your Qlikview data. Also the image is more accurate.**

If the address is known, you should geocode the address which will allow the lead to be mapped and navigated to from your Impact.

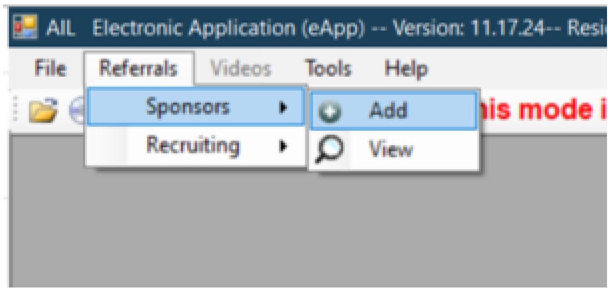


When adding a lead from Impact the Image from the Lead Detail screen will display 'No Image'.



When a lead is added from eApp, Qlikview will collect the data as a referral collected, when an on-line update is performed in eApp, the lead will process through the address/phone number update append software and the image will look like this in Impact:

Note: after an on-line update is performed in eApp, it may take 30-90 minutes for the referral lead to appear in Impact.



Add New Sponsorships

AMERICAN INCOME LIFE
insurance company

Sponsorships

*Agent # IU961
*Referred By CYAN KISSINGER
Organization IMPACT TEAM
* Referral Type Internet Surfin' Guide
* Date 10/13/2022

Person 1

Is the

of

*First Name NAOMI
Referral Relationship SISTER IN LAW
Spouse
Home # (330) 219-0590
Cell #
Address 150 N CARPENTER
Address2
*City BRUNSWICK
*St./Prov. OH
Zip/Postal Code 44212
Out Of Area
E-mail sasurace@ailife.com
Best Time to Call Morning Afternoon Evening
Notes Nurse with 2 kids

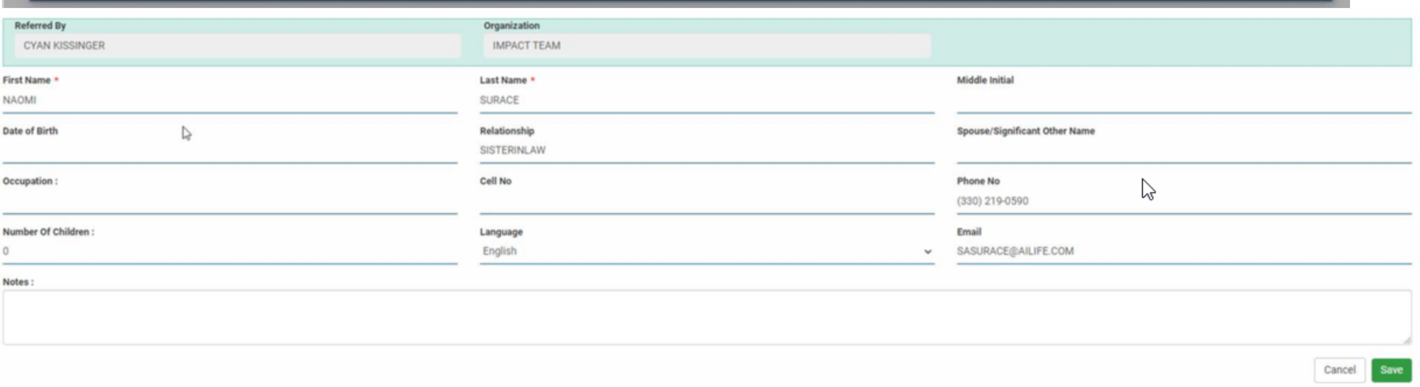
Person 2

*First Name
*Last Name
Referral Relationship
Spouse
Home #
Cell #
Address
Address2
*City
*St./Prov.
Zip/Postal Code
Out Of Area
E-mail
Best Time to Call Morning Afternoon Evening
Notes

Add Additional Person

Most individuals sponsor an average of 10 people

Submit



Referred By CYAN KISSINGER
Organization IMPACT TEAM

First Name * NAOMI
Last Name * SURACE
Middle Initial
Date of Birth
Relationship SISTERINLAW
Spouse/Significant Other Name
Occupation :
Cell No
Phone No (330) 219-0590
Number Of Children : 0
Language English
Email SASURACE@AILIFE.COM
Notes :

Cancel
Save

REFERRAL

SURACE

LAST | DATE OF BIRTH

NAOMI

FIRST | MIDDLE

150 N CARPENTER

HOME ADDRESS

BRUNSWICK | OH | 44212

CITY | STATE / PROVINCE | POSTAL CODE

3302190590

HOME TELEPHONE | CELLULAR PHONE NUMBER

CYAN KISSINGER | SISTERINLAW

REFERRED BY | RELATIONSHIP

3.3.3.1.2. Lead Detail Screen

Edit Lead Button allows you to edit information on the lead. You can edit more fields on a Referral than any other lead.

Action Indicators When these buttons are colored in, it indicates a call has been made, an appointment has been set or a comment has been added.

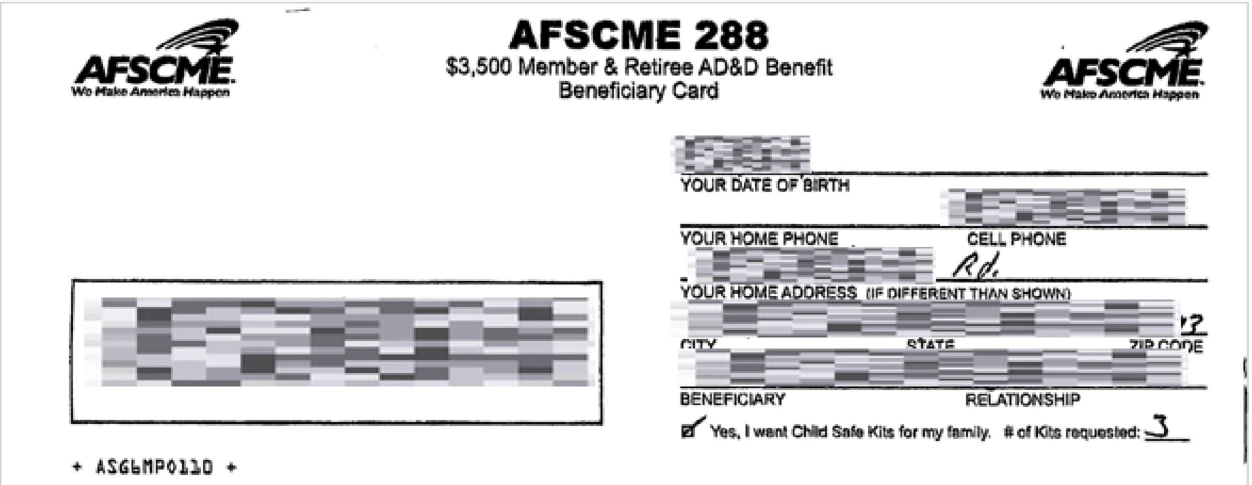
Navigation Buttons allow you to view leads on a map or allows you to navigate from your phone. The Navigation buttons will only be available if the address is Geo Coded indicated by a Green Globe next to the editable address.

Contact Buttons allows you to use your phone app to Call Mobile, Home or text mobile when the numbers are available. When you select these buttons, the what happened, and resolution screens will appear. If the numbers are not available, those buttons will not be accessible. The dropped by button will allow you perform a door knock and allow you account for what happened.

Resolution Buttons These buttons will not be accessible until a contact button is selected. These will allow you to account for the resolution of the scheduled appointment.

The comment section will allow you to view the most recent comment or show more to view previous comments. You can also add a comment in this section.

You can also view the last action taken in the Status section. You will be able to see the most recent until you show more to reveal all actions taken on a lead.



AFSCME 288
$3,500 Member & Retiree AD&D Benefit
Beneficiary Card

[redacted]

YOUR DATE OF BIRTH [redacted]

YOUR HOME PHONE CELL PHONE

[redacted] Rd.

YOUR HOME ADDRESS (IF DIFFERENT THAN SHOWN)

[redacted]

CITY STATE ZIP CODE

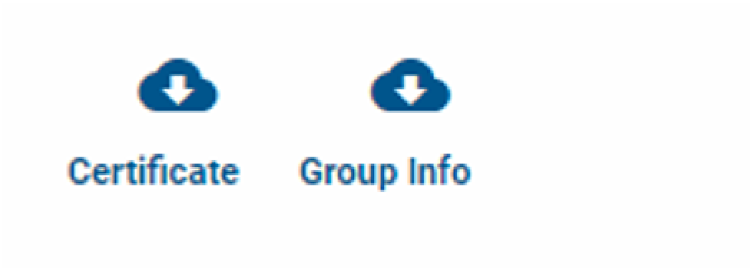
[redacted]

BENEFICIARY RELATIONSHIP

☑ Yes, I want Child Safe Kits for my family. # of Kits requested: 3

+ ASG6MP0110 +

Actual Card Returned by the potential Client



Certificate – The AD&D Certificate customized to the lead

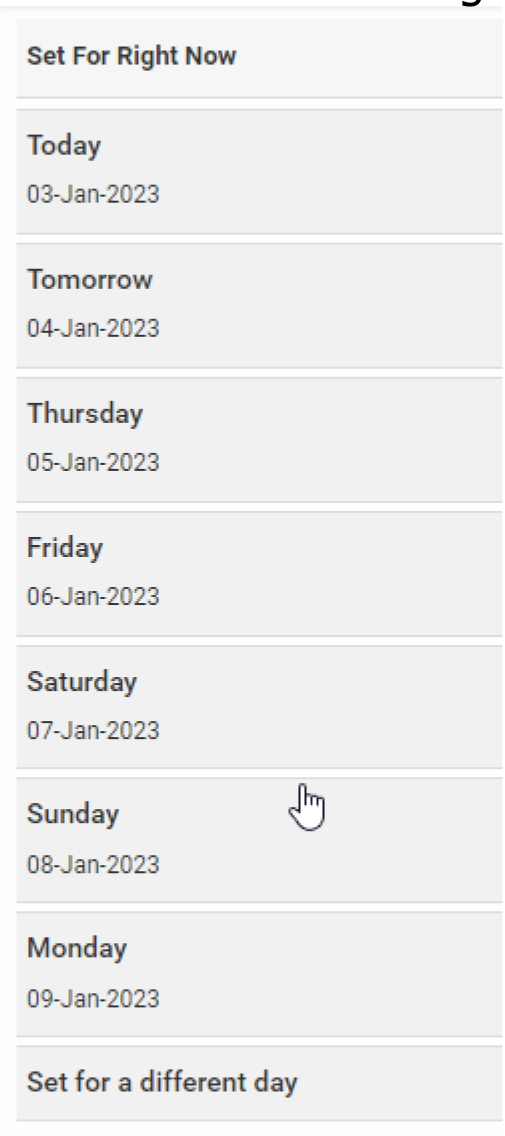
Group Info- The original approach letter in English and Spanish, the Read off letter in English and Spanish, and other lead information. The TG-13A Information sheet is often included on Unions. This will tell you about the companies that belong to the Union, the types of benefits and what happens to them when the members retire.

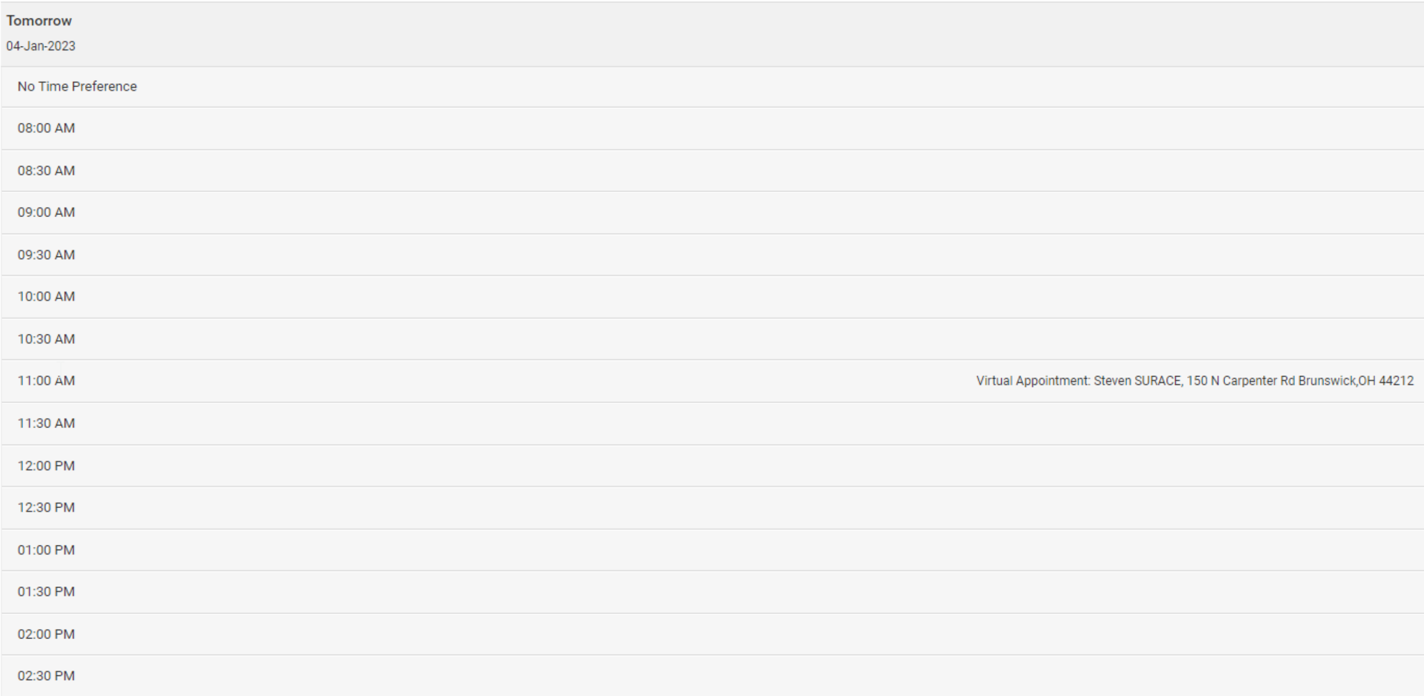
Coming Soon- Vendor lead information and Union President Testimonial Video Links.

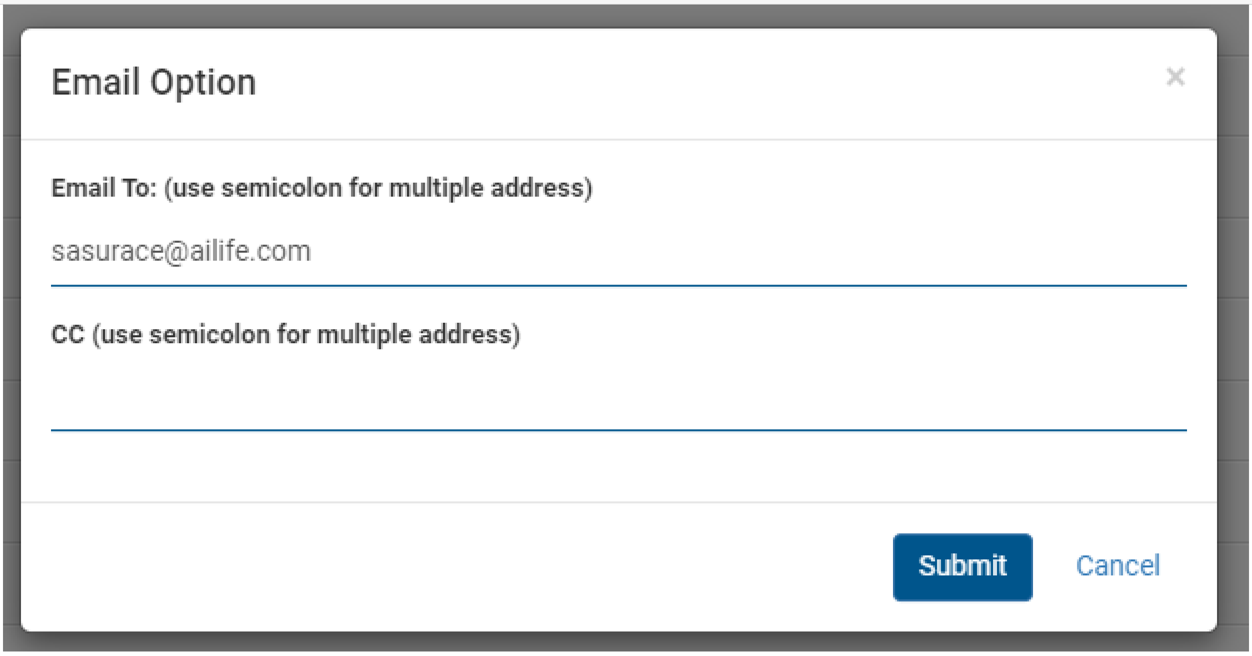
3.3.3.1.3. Contacting a lead from your lead inbox

When using a cell phone and the Call Home or Call Mobile Contact Button are selected, your phone call app will open which will allow you to call the lead. You will then minimize your call app and return to the lead screen and the CALL WHAT HAPENED? Menu will be displayed. You will select the best option available to indicate the result of the call.

Set In Home and Set Virtual will display your schedule allowing you to set for now or at a later time. Once the appointment is scheduled the following reminder will be sent







In Home(no email will be sent only the following text): Hi (clients first name), this is (Agents Name in preference) with (AIL/NILICO/AIL in Canada/AIL of New Zealand) and I am looking forward to meeting with you and your family on (date and time). As we discussed, I appreciate your being available at this time. See you soon!

Virtual: **Text Reminder** - this is automatic and not editable by the agent. The agent cannot stop this. This is NOT Optional

Hi (clients first name), this is (Agents Name in preference) with

(AIL/NILICO/AIL in Canada/AIL of New Zealand) and I am looking forward to meeting with you and your family via a virtual meeting on (date and time). As we discussed, 5 minutes before our meeting, please click the link that has been sent to your email. For the best viewing experience, we recommend using your Tablet or Laptop. See you soon!
Virtual Meeting Link: (from preferences). If the virtual meeting link is not present – it will say Virtual Meeting Link: Not Available
If you have any issues connecting to the virtual meeting, please contact me at (Agents Phone number in Preferences)

Email Reminder – for virtual appointments only
Hi (clients first name), this is (Agents Name in preference) with (AIL/NILICO/AIL in Canada/AIL of New Zealand) and I am looking forward to meeting with you and your family via a virtual Meeting on (date and time). As we discussed, 5 minutes before our meeting, please click the link that has been sent to your email. For the best viewing experience, we recommend using your Tablet or Laptop. See you soon!
Virtual Meeting Link: (from preferences). If the virtual meeting link is not present – it will say Virtual Meeting Link: Not Available

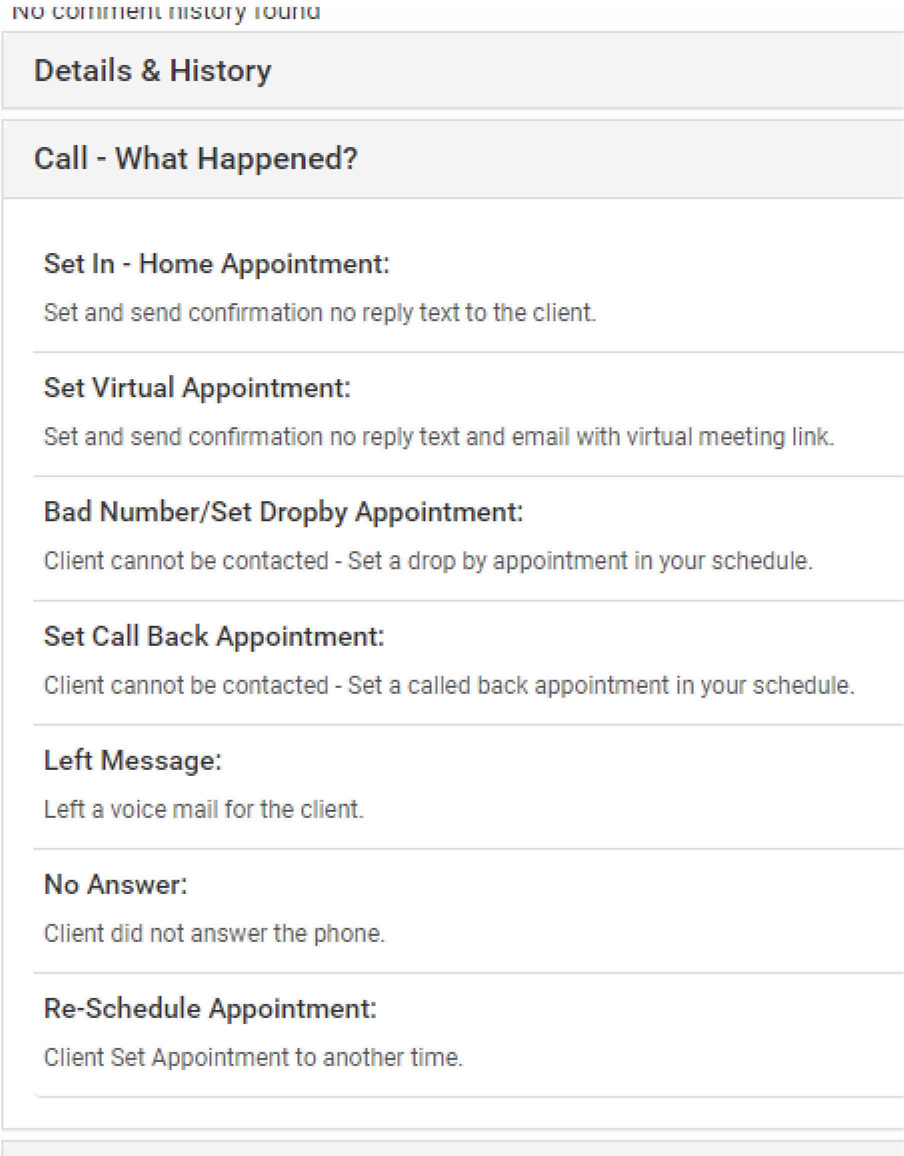
If you have any issues connecting to the virtual meeting, please contact me at (Agents Phone number in Preferences)

Bad Number/Set drop by will allow you to add this appointment to your schedule so you can navigate to the lead and perform a door knock. If you are NOT in the field and you only work virtually, you should RESOLVE as a bad number.

Set a Call Back will put the lead in your schedule during a future time to remind you to call back.

Left Message and No answer will indicate the call was attempted but no other action will be added to the lead until the next time you call it. It will be returned to you lead banks.

Re-Schedule Appointment will be used when a previous appointment was scheduled and you call the client or the client calls your to reschedule for a better time. A new email and text will be sent.



3.3.3.1.3.1. Send Text

When the **Send Text Button** is used, the Send Text- What Happened Screen will appear. When you

select Send Text
A customized text based on lead type will be sent to the client from a no reply phone number. This should be used when the call home and call mobile did not result in a contact.

If the client texts or calls you back and would like to schedule an appointment or Refusing delivery you should find the lead, then select Send Text which will indicate the source used to make the contact. Then use the What Happened screen to indicate your result to set the appointment or resolve the lead.

Send Text - What Happened?

Send Text:
Contact client via text if they are unreachable by phone to schedule an appointment.

Set In - Home Appointment:
Set and send confirmation no reply text to the client.

Set Virtual Appointment:
Set and send confirmation no reply text and email with virtual meeting link.

Bad Number/Set Dropby Appointment:
Client cannot be contacted - Set a drop by appointment in your schedule.

Set Call Back Appointment:
Client cannot be contacted - Set a called back appointment in your schedule.

PRO-TIP: It is very helpful to screen shot the lead image the client filled out and mailed in to prove we are calling due to the clients request and download the original letter from the group using the link at the bottom of the lead detail screen. This will increase your contact ability and responsiveness of your client. For Vendors you can use the literature used to generate the Vendor Lead.

Below is the customized verbiage used to contact the lead based on lead type:

Response Card
Hi, (Clients First Name), we have received the response card you sent in for the No Cost benefits provided through (American Income Life/National Income Life/ American Income Life in Canada / American Income Life in New Zealand) and (group name). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

Referral – Lead type REFER
Hi, (Clients First Name), your (Relationship of Sponsor) (Referred by Name) sponsored you for some No Cost benefits provided through (American Income Life /National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits as they requested and I'm available today. What's your

availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)
If there is no relationship entered we have friend as the default will that still work? Yes

Referral – Lead type Child Safe Mobile (CMAPP)
Hi, (Clients First Name), your (Relationship of Sponsor) (Referred by Name) sponsored you for a No Cost Child Safe Kit provided through (American Income Life/National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits as they requested and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)
If there is no relationship entered we have friend as the default will that still work? Yes

Child Safe Lead Type
Hi, (Clients First Name), we have received your request for the No Cost Child Safe Kit through The Child Safe Program of (American Income Life/National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in

preference).
Contact me at (Agents Phone Number in Preferences)

Will Kit Lead Type
Hi, (Clients First Name), we have received your request for the No Cost Will Kit through The Will Kit Program of (American Income Life/National Income Life/American Income Life in Canada/American Income Life in New Zealand) I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work?
Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

Final Expense Lead Type
Hi, (Clients First Name), we have received your request for the Final Expense Benefit through (American Income Life /National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work?
Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

POS Lead Type/LAPOS
Hi, (Clients First Name), we are reaching out to update your No Cost benefits and provide a review or your policy through (American Income/National

Income/American Income in Canada/American Income in New Zealand). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

List Lead Type – D-Card

Hi, (Clients First Name), we are reaching out to update and renew your AIL Plus Health Service Discount program and No Cost benefits provided through (American Income Life/National Income Life/American Income Life in Canada/American Income Life in New Zealand). I'd like to set a time to review these benefits and I'm available today. What's your availability when you get home from work? Thank you, (Agents Name in preference).
Contact me at (Agents Phone Number in Preferences)

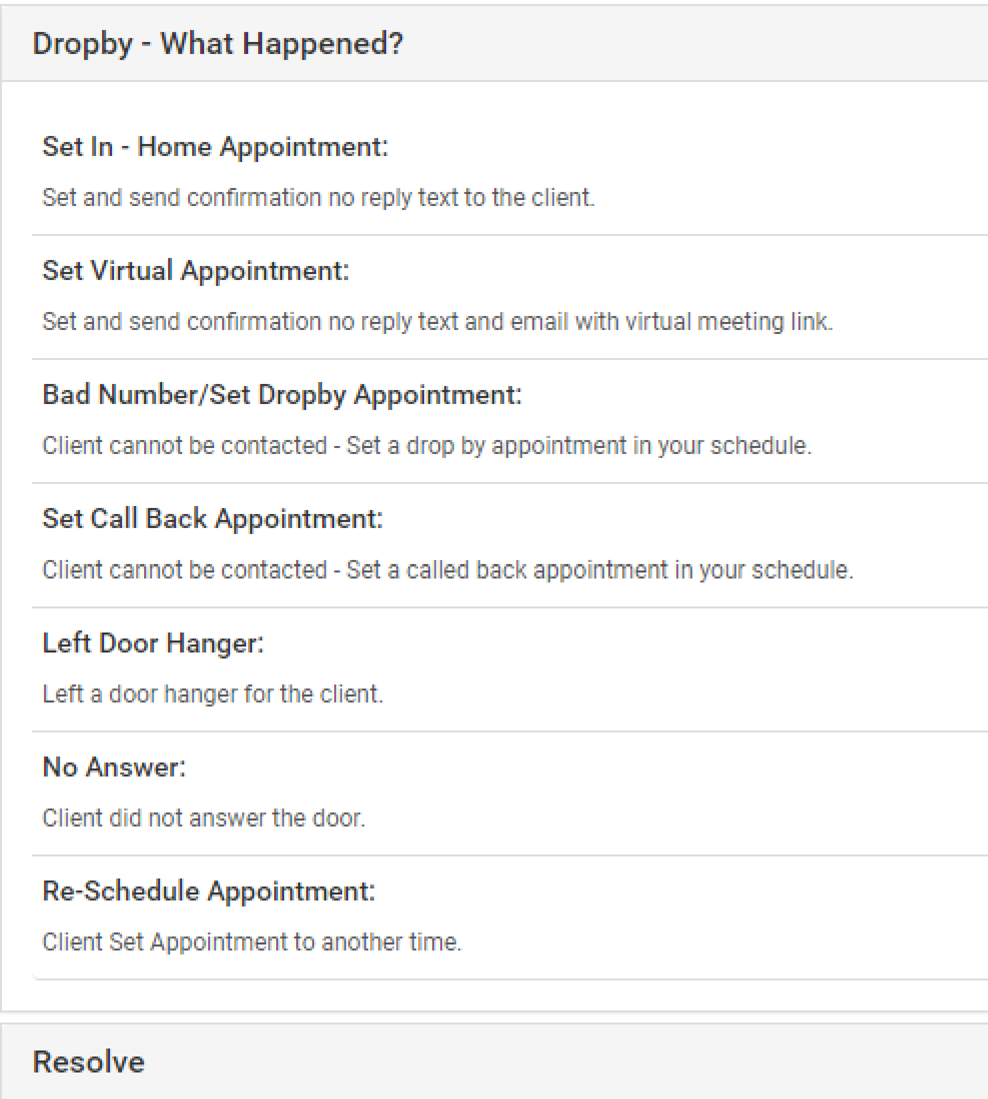
List Lead Type - Globe

Hi, (Clients First Name), as a sister company of Globe Life, American Income Life has been appointed to assist you. I'd like to set a time to review your benefits available and I have openings in my schedule today. What's your availability when you get home from work? Thank you, (Agents Name in preference).

Contact me at (Agents Phone Number in Preferences)

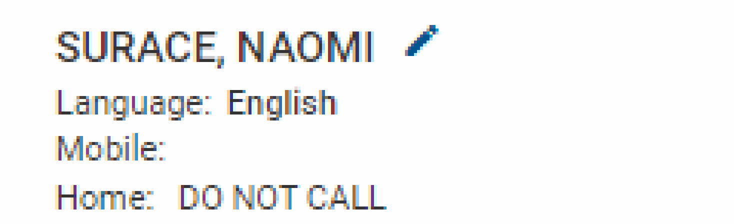
3.3.3.1.3.2. Dropped By

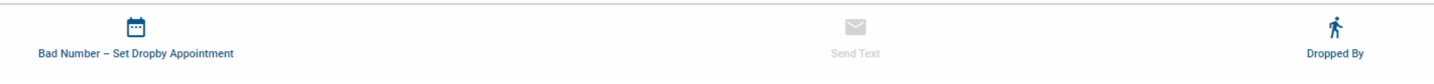
When the Dropped By Button is selected, it means you physically navigated to the leads home and performed a dropby (note: some leads we can NOT door knock per the special instructions from the group). When we perform the drop by you will select the Dropped by button and the Drop by - What Happened screen will allow you indicate and record the results of the drop by.



If The client refuses the appointment or is no longer at the physical location you can Resolve the lead to indicate the same.

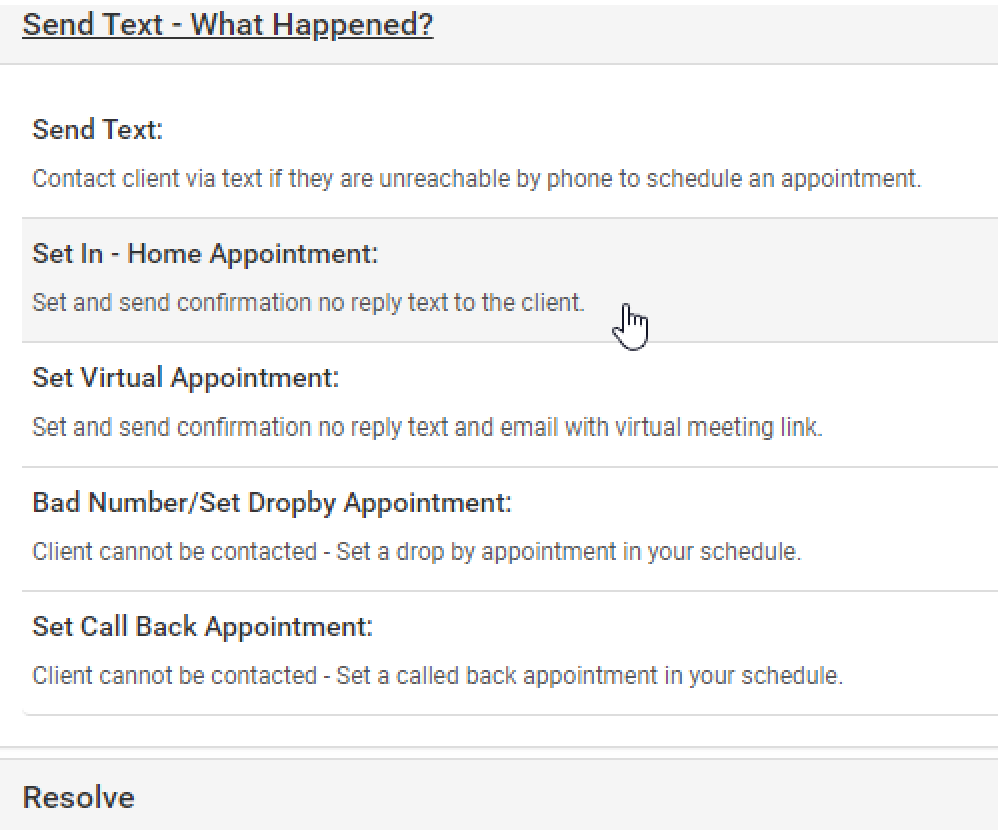
If the lead does not have a phone or is on the Internal Do Not Call List, the only option you will have is to Set a Drop by or Drop by the location.

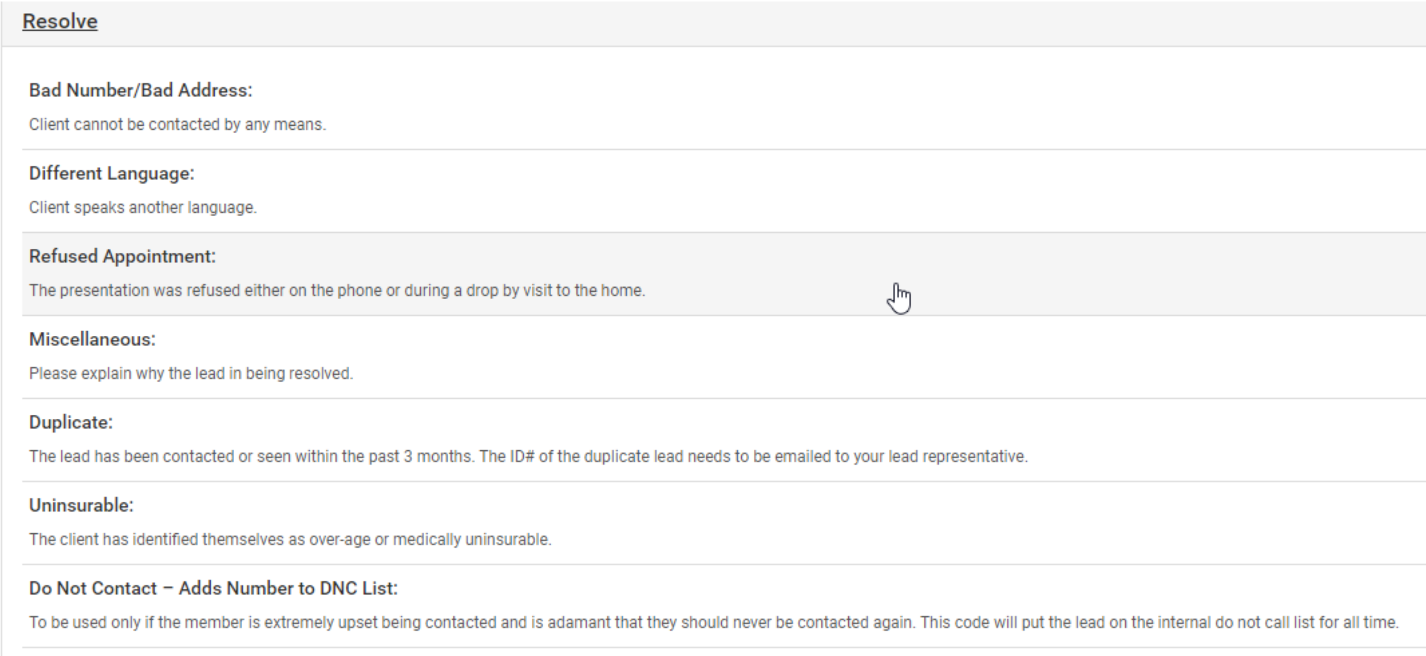




3.3.3.1.3.3. Resolve from a phone call

To Resolve a lead from a phone call, you will open the Resolve Menu from the bottom of the What Happened Screen.





Bad Number/Bad Address: you should only use this if you are 100% virtual or you have no ability to door knock the client. you should also indicate in the notes, any actions that were done to obtain a new phone number.

Different Language: You would use this resolve to indicate the client speaks a language that you do not. Currently we can mark the lead English, Spanish, and French.

Refused Appointment: please indicate why the client refused the appointment.

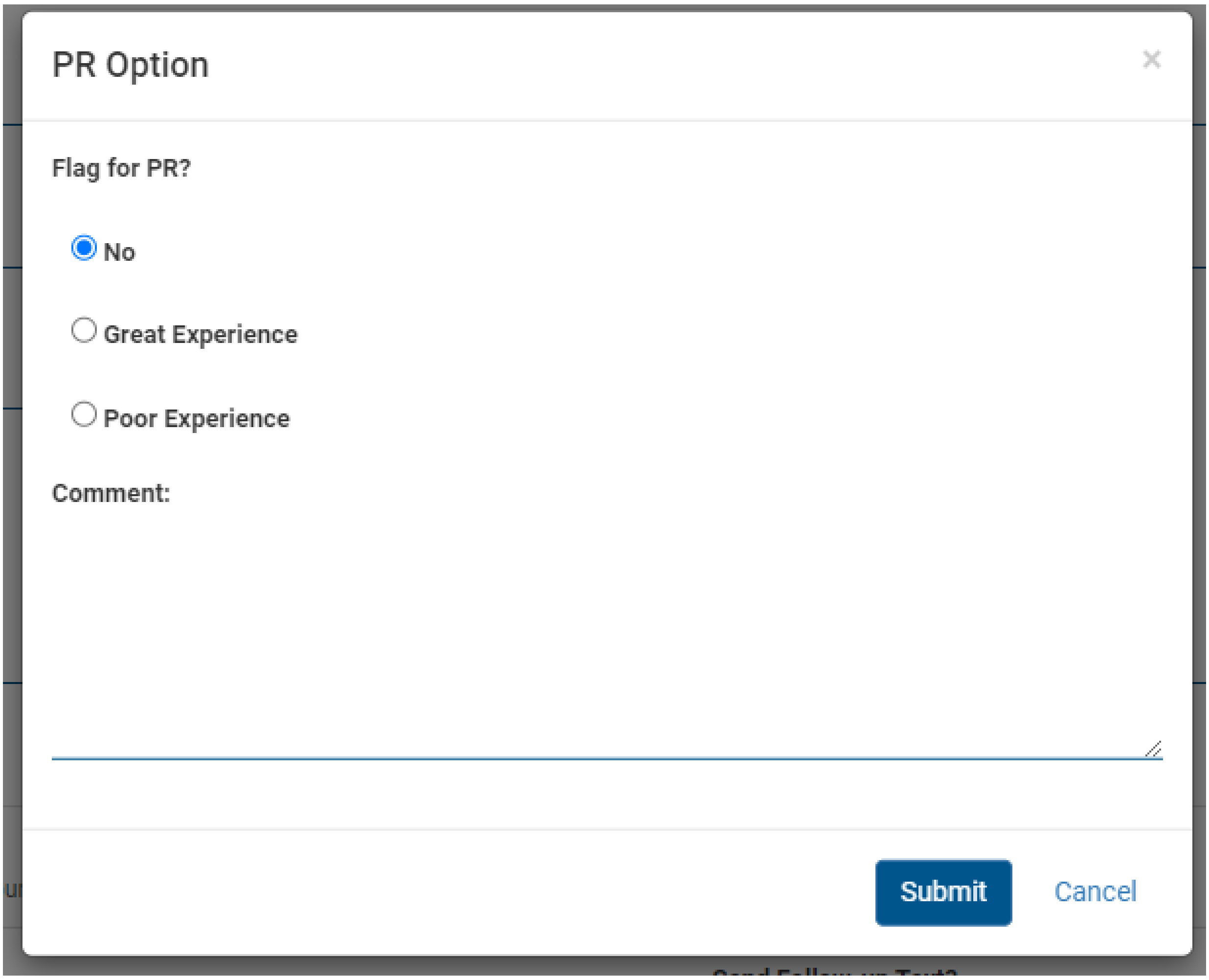
Miscellaneous: Should be rarely used and should always include why you are resolving as a Misc and why it doesn't fit in other resolve definitions.

Duplicate: if the lead was just seen and the client does not want another visit, use this choice.

Uninsurable: Should be rarely used. Remember there are other insurable members in the household to include children or grandchildren. Also you still have the ability to get referrals.

Do Not Contact: This should not be used without the permission and approval of your up line first. Using this resolve will place the clients phone number for the current lead and any future responses on our Internal Do Not Contact list.

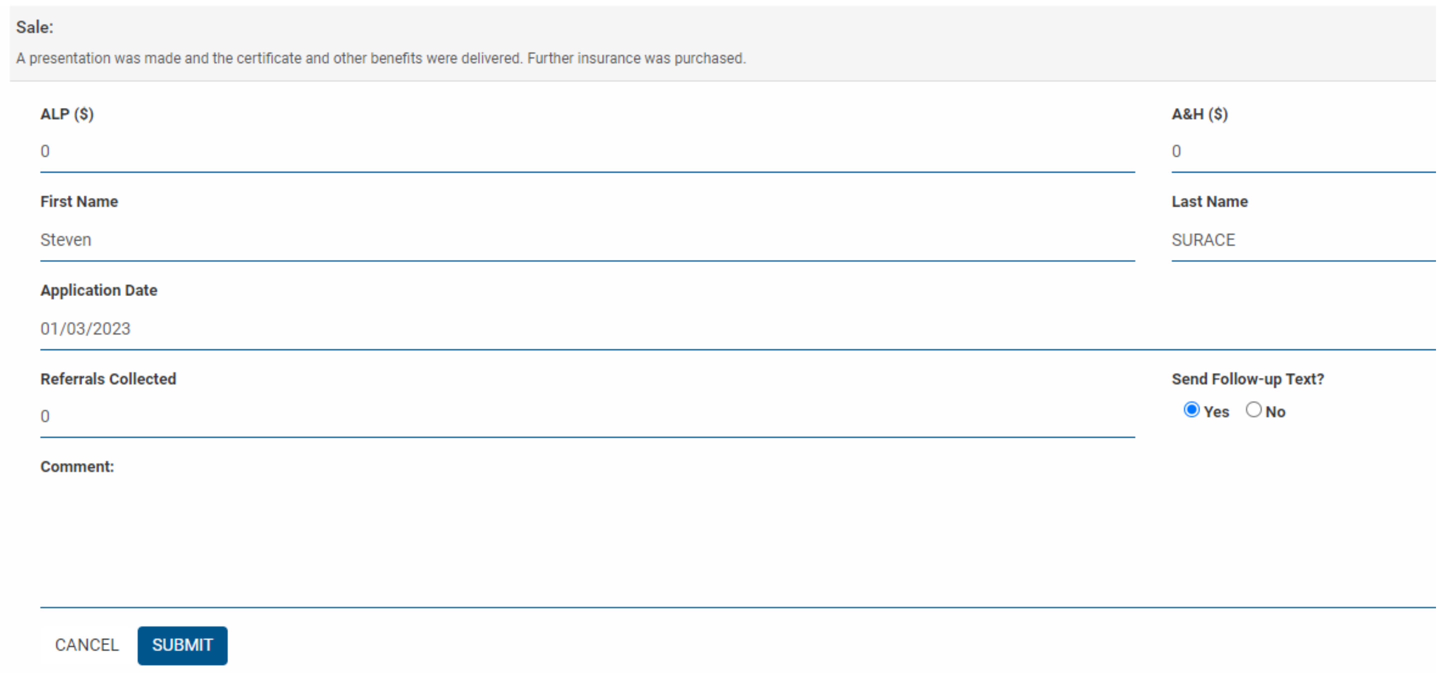
When a lead is resolved you will have the option to leave our Public Relations Team and Your State General Agent a message based on the experience, this will allow our Public Relations Team to be proactive to solve any Union/Association or Credit Union issues.

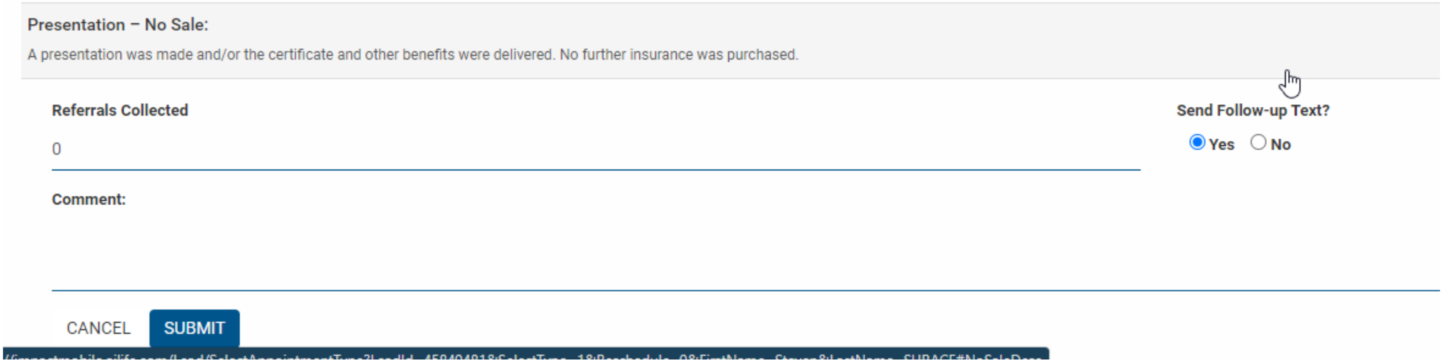


3.3.3.1.4. Resolve a scheduled lead

Upon your scheduled appointment time you can access your lead from your schedule. When the lead is open you will be able to view comments and lead details. You can also Resolve the lead accordingly.

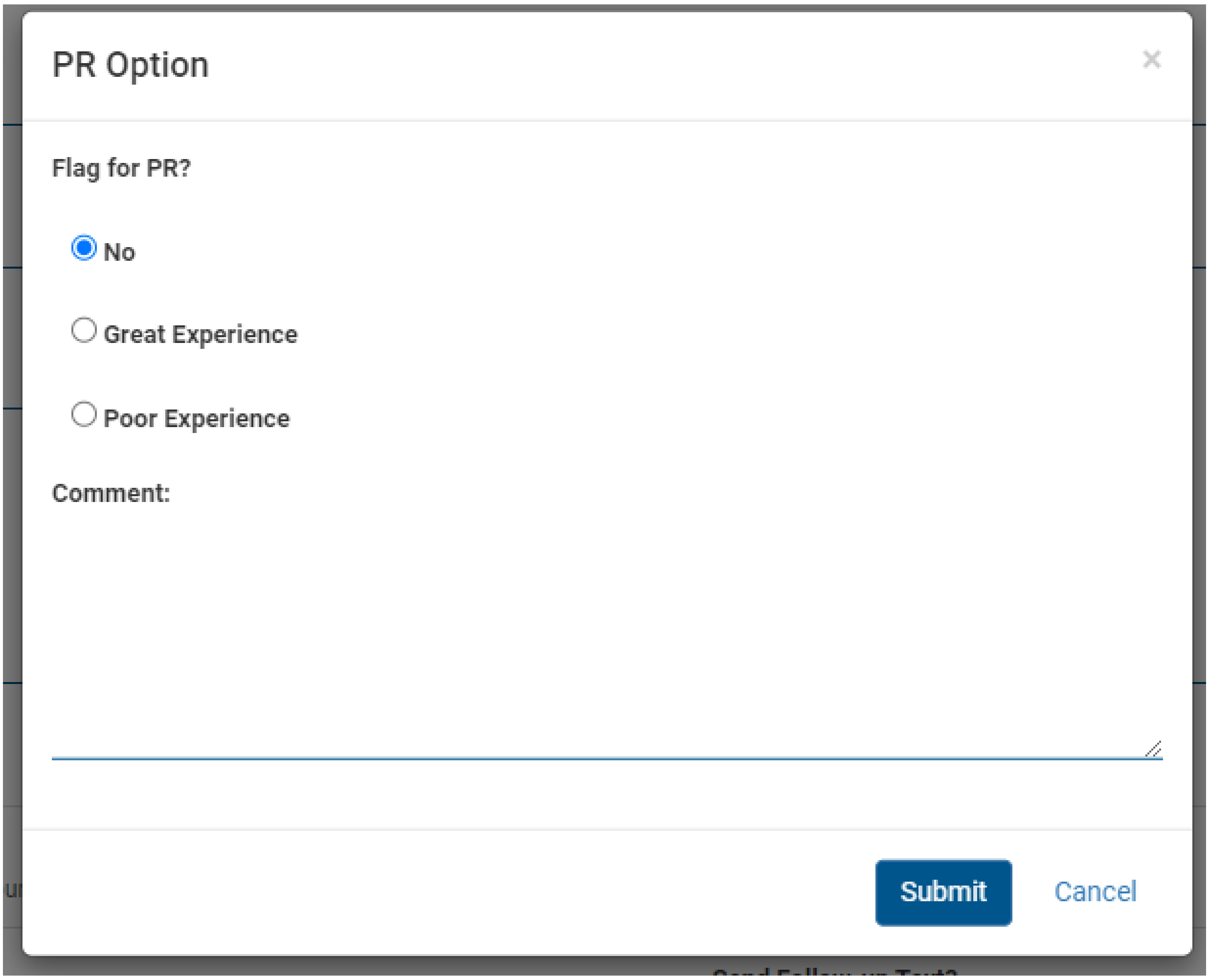
Pres Done- indicates the presentation was given to the client and you will have to report the Sale or No Sales. Sales you will report the Annual Life Premium and amount of Sales Referrals collected. You will be given the choice to send a follow up text which will allow the client to leave a Google Review from their cell phone. Pro-Tip: to obtain more than one Google review per household, ensure you check out of the appointment while the client is present. when the Google link from your preferences is texted to your client have them forward the link to their spouse.



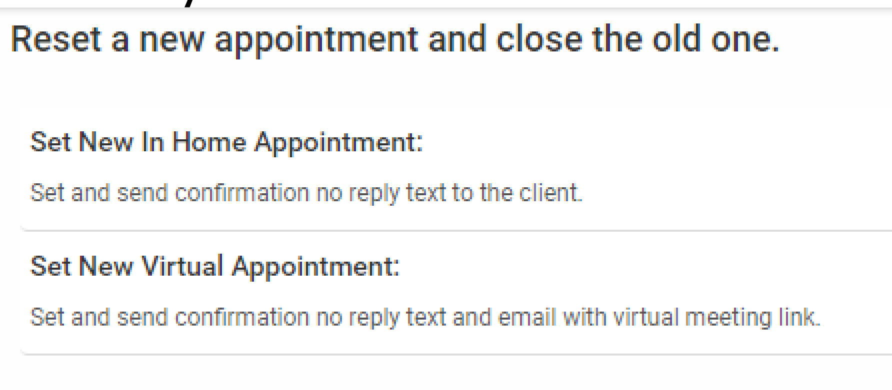


Text Verbiage for Follow up text - Hi (Clients First Name)! Thank you again for taking the time to review your benefits! To help share our services with more working families like yours, I'd really appreciate it if you could leave me a review. If you include my full name, it would really help me out! Thank you again! (Agent name from preference) (review link from preference)

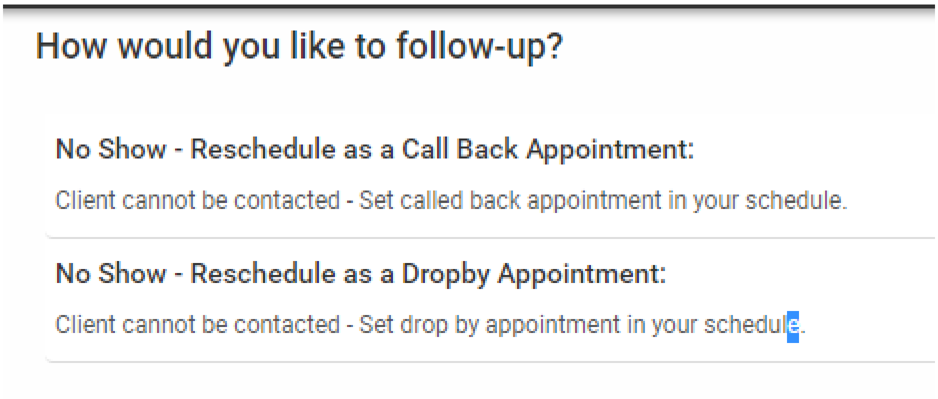
When a lead is resolved you will have the option to leave our Public Relations Team and Your State General Agent a message based on the experience, this will allow our Public Relations Team to be proactive to solve any Union/Association or Credit Union issues.



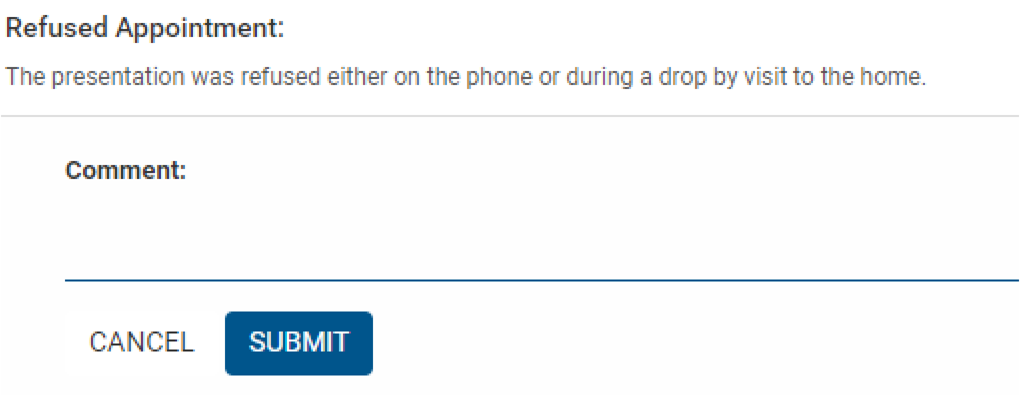
Reschedule - indicates your client or spouse were present but they could not complete the presentation at the desired time. This will allow you to move it and choose a better time in your schedule.

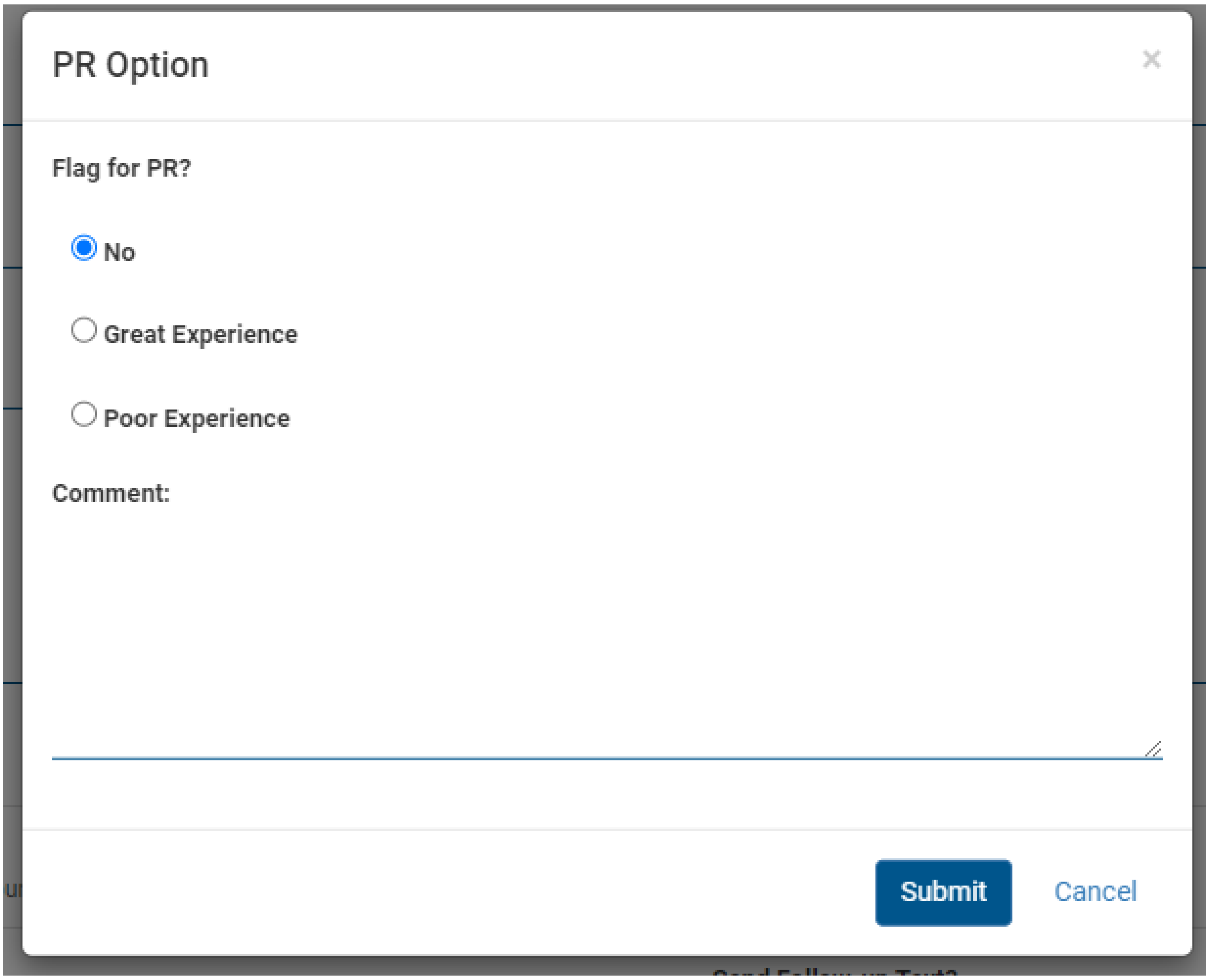


No Show - indicates the client and spouse did not show for the presentation at the scheduled time. You can now schedule for a call back or a drop by.



Refused Appointment - indicates the client did not allow us to present the cost benefits. You will leave a comment and you can you will have the option to leave our Public Relations team a message if necessary.





3.3.4. Policy Search.

The Policy screen allows you to search by the following criteria:

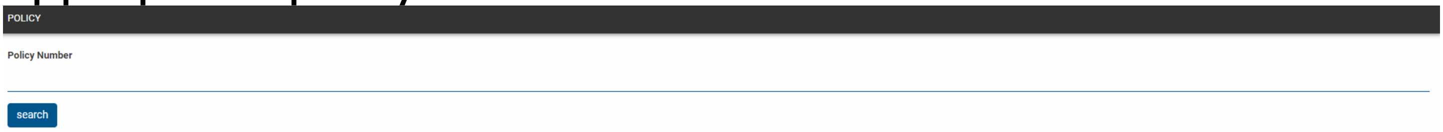
Policy for Search
An agent can search for as many policies as they need but are limited to download a policy PDF no more than 3 times in
a 24-hour period. (This policy search can be restricted or turned OFF by the SGA).

**Your SGA has the Option to disable the search function based on Agent Contract Level. This will prohibit the Policy Search Function from opening.

Search by Policy Number

This option allows you to search for a policy assigned to your agency by policy number.

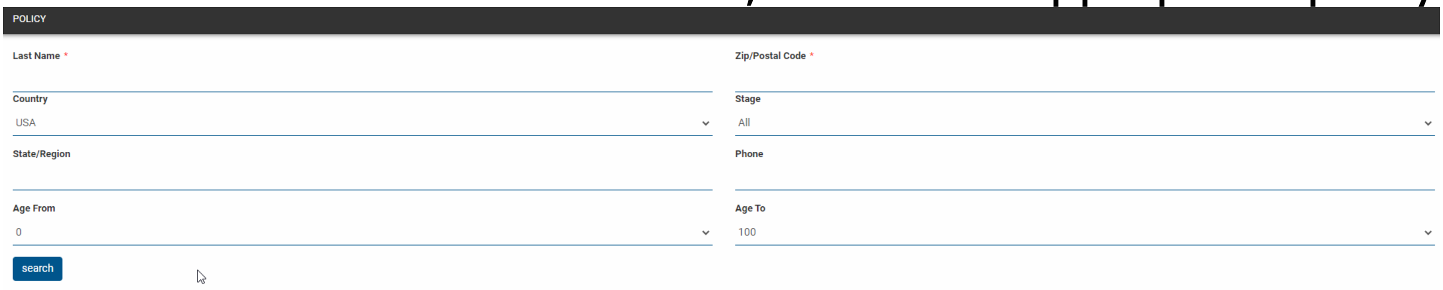
Enter the policy number, click search and select the appropriate policy.



Search by Last Name and Additional Criteria

This option allows you to search for a policy assigned to your agency by last name and additional criteria.

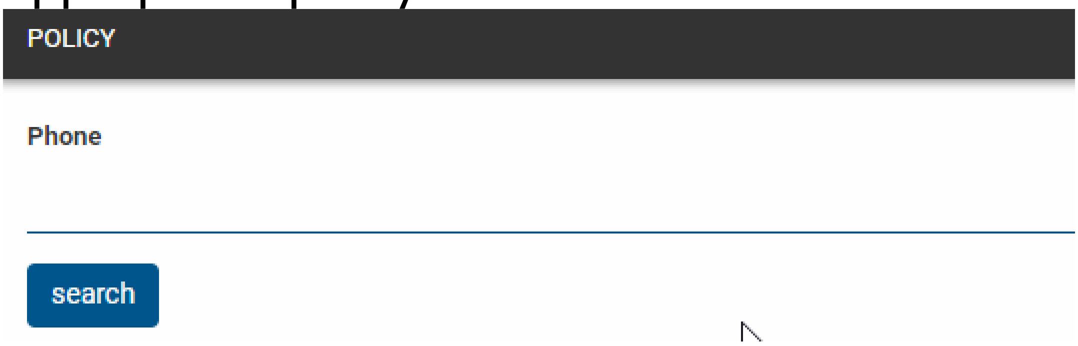
Enter the last name, enter additional criteria and click search. From the search results, select the appropriate policy



Search by Phone Number

This option allows you to search for a policy assigned to your agency by policy number.

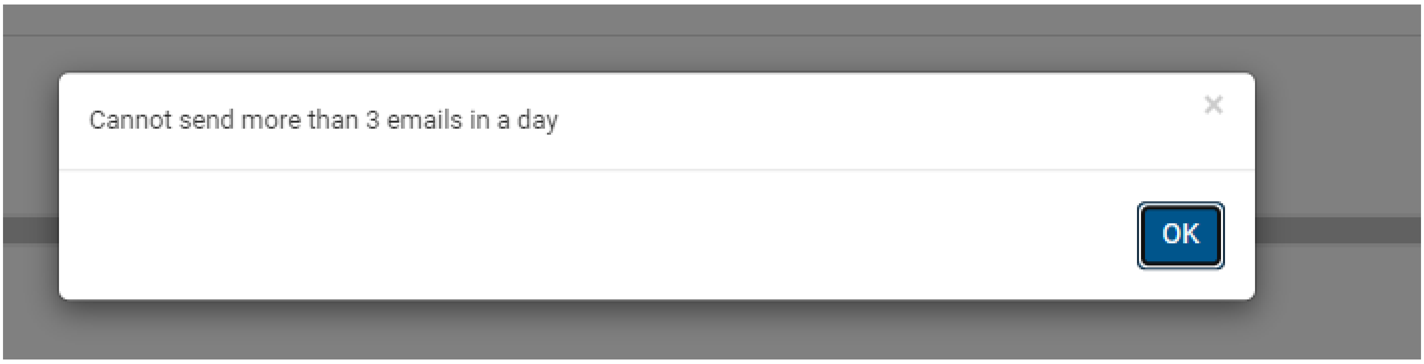
Enter the phone number, click search and select the appropriate policy. Phone Number



Send PDF

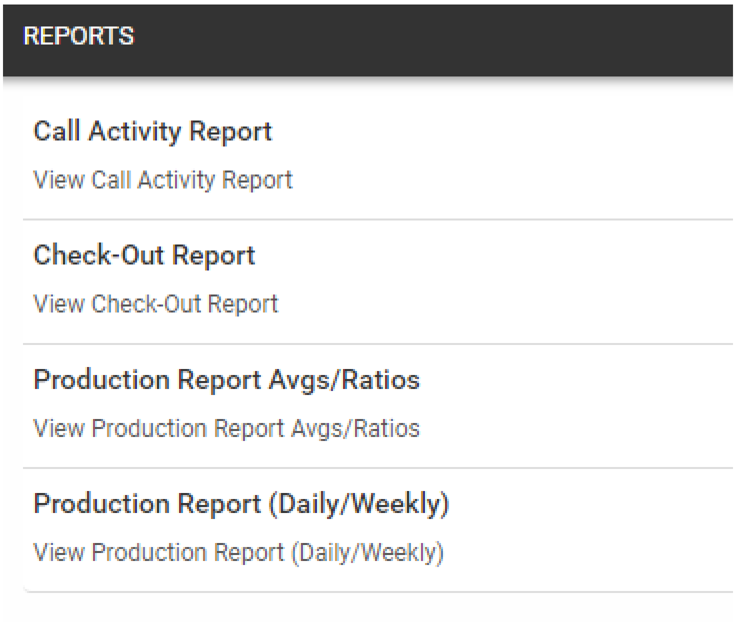
This option allows you to send the policy PDF to the email

associated with your user profile information.
Search for the appropriate policy, locate the policy in the results grid and click Send PDF.



3.3.5. My Report

Reports



Call Activity Report: This report will show you the Daily/Weekly/Monthly results of yours or your assigned agents efforts during a Phone session. It is recommended for every hour of call activity, an agent should average a minimum of 30 calls. Your Weekly calls should be between 500 and 1000 calls per week. Calls to Contact should average around 20. Calls to Appt should average around

35. Contact to Appt % should average 50%. These are based on Company Averages. To improve these areas please contact your Manager for tips and training. This tool can be viewed hourly to ensure yours or your agents are on pace to being productive during a daily phone session.

Name	Total Calls	Contacts	In-Home Appointments	Virtual Appointments	Calls to Contact	Calls to Appt	Contact to Appt %

Check-Out Report: This report will show you the Daily/Weekly/Monthly results of yours or your assigned agents check out results. This includes Pres-Sales, Pres-No-Sales, Resets, No-Shows, Drop Bys and Refused Appointments. This is separated by In-Home and Virtual.

In-Home Virtual

Name	Check-Out	Pres–Sales	Pres–No-Sales	Resets	No-Show	Drop Bys	Refused

View Daily Production Report Avg/Ratios

This report will show you the Weekly results for Show Ratio, Referrals per preso, ALP and A&H per sale, and closing ratio and closing ratio per lead type. This report is heavily dependent on accurate reporting when a lead is checked out.

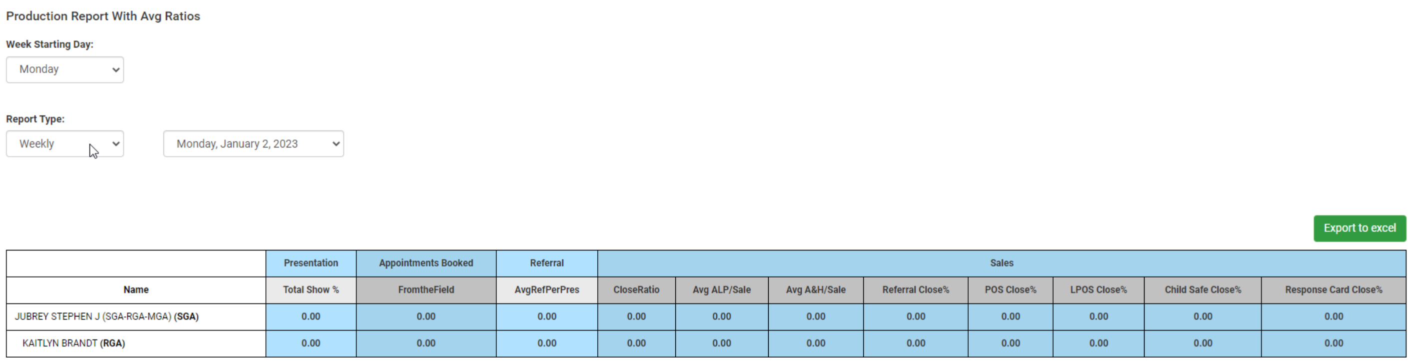
The Production Report with Avg Ratios is a statistical view of the Production Weekly Report. You will have the ability to view all of the agents in your hierarchy. All user levels will have access to this option.

The values are determined by the following calculations:
Total Show % Presentation Total/Appointments Total
From the Field (Drop By + Home + Car)/Appointments Total
Avg Ref Per Pres Referrals Collected/Presentation Total
Close Ratio % Sales Total/ Presentation Total

Avg ALP/Sale ALP/Sales
Avg A&H/Sale A&H/Sales
Referral Close% Sales Referral/Presentation Referrals
POS Close% Sales POS/Presentation POS
Child Safe Close% Sales Child Safe/Presentation Child Safe
Response Card Close% Sales Response Card/Presentation Response Card
Avg ALP/Sale ALP/Sales

Export to Excel

This option allows you to export the production report avg/ratios to an excel file.
Click Export to excel to generate the file and open in Excel.


Production Report With Avg Ratios

Week Starting Day:

Monday

Report Type:

Weekly | Monday, January 2, 2023

Export to excel

	Presentation	Appointments Booked	Referral	Sales							
Name	Total Show %	FromtheField	AvgRefPerPres	CloseRatio	Avg ALP/Sale	Avg A&H/Sale	Referral Close%	POS Close%	LPOS Close%	Child Safe Close%	Response Card Close%
JUBREY STEPHEN J (SGA-RGA-MGA) **(SGA)**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
KAITLYN BRANDT **(RGA)**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

This report will display your weekly and daily appt, preso, referral and sales results for you and your assigned team.

The Production Report (Daily/Weekly) allows you to view production results for the SGA office for the week. You will have the ability to view all of the agents in your hierarchy. All user levels will have access to this option.

View Daily Production Report

The Daily Production Report allows you to view production results for the SGA office for a specific day. You will have the

ability to view all of the agents in your hierarchy.
1. Select Production Report (Daily/Weekly) from the Production menu
2. Select the daily for the Report Type and select the appropriate day.
3. Notice the week staring day, this is set from Impact Manage.

View Weekly Production Report

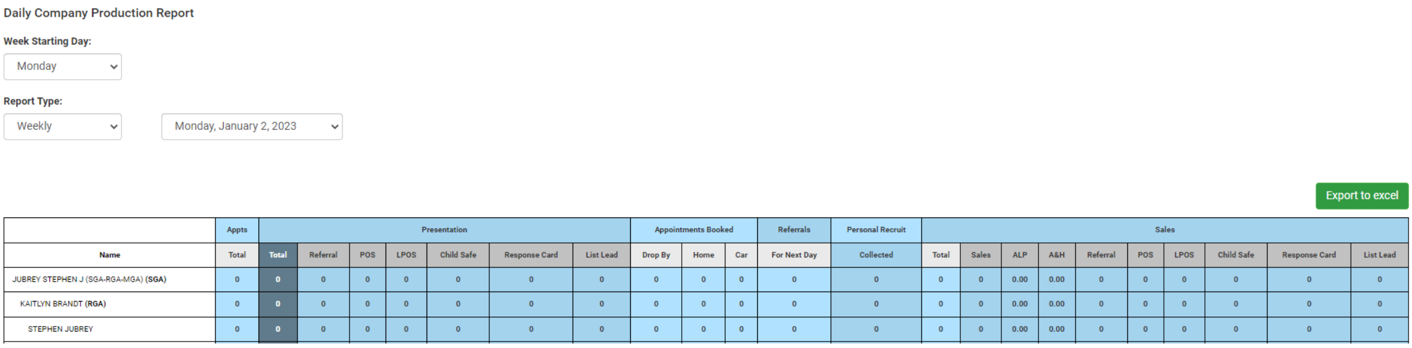
The Weekly Production Reports allows you to view production results for the SGA office for the week. You will have the
ability to view all of the agents in your hierarchy.
1. Select Production Report (Daily/Weekly) from the Production menu.
2. Select the weekly for the Report Type and select the appropriate day.
3. Notice the week staring day, this is set from Impact Manage.

Export to Excel

This option allows you to export the daily/weekly production report to an excel file.
Click Export to excel to generate the file and open in Excel.

Week Starting Day

The week starting day is set from Impact Manage.
1. Login to Impact Manage.
2. Select the day of the week for the starting day and click save.



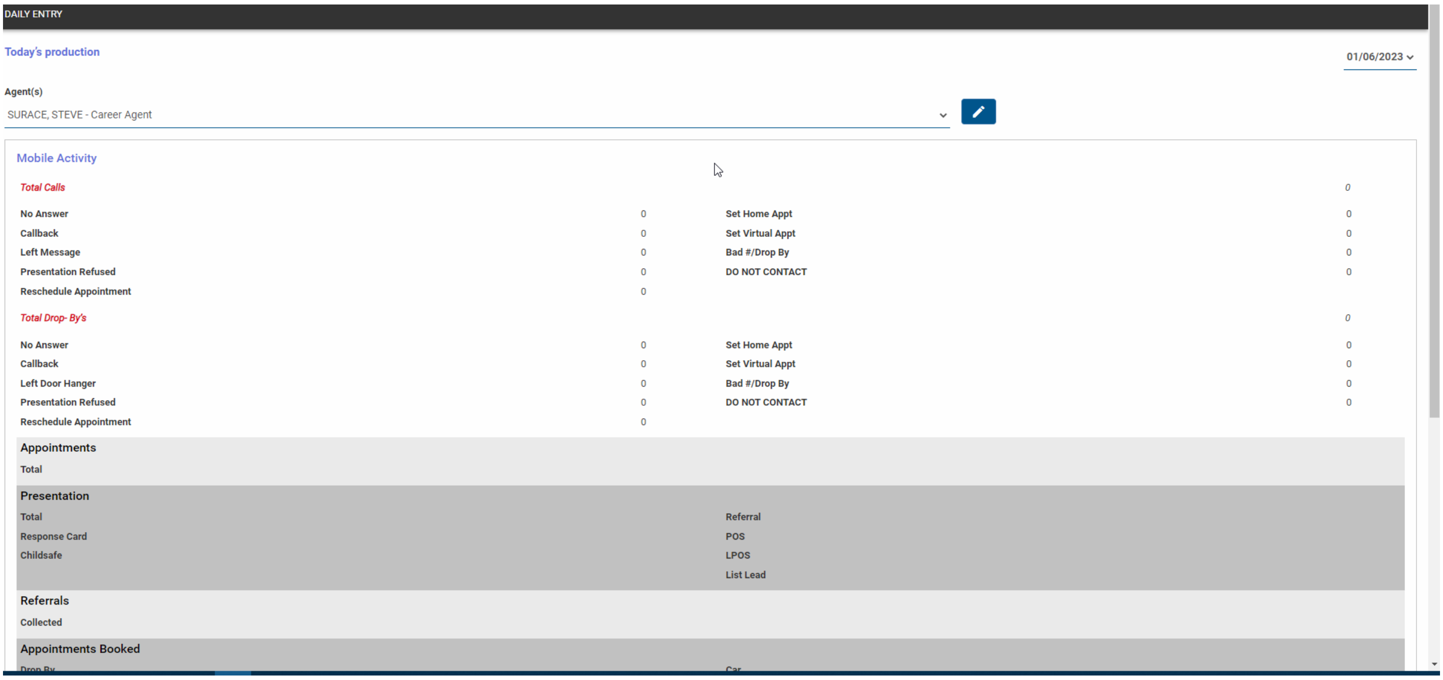
	Appts	Presentation							Appointments Booked			Referrals	Personal Recruit	Sales									
Name	Total	Total	Referral	POS	LPOS	Child Safe	Response Card	List Lead	Drop By	Home	Car	For Next Day	Collected	Total	Sales	ALP	A&H	Referral	POS	LPOS	Child Safe	Response Card	List Lead
JUBREY STEPHEN J (SGA-RGA-MGA) **(SGA)**	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0.00	0	0	0	0	0	0
KAITLYN BRANDT **(RGA)**	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0.00	0	0	0	0	0	0
STEPHEN JUBREY	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0.00	0	0	0	0	0	0

3.3.6. Enter Today's Production

This option allows you to update and verify the daily production and results for the current day. The screen will be populated with your mobile activity and data based on how leads have been resolved. When you resolve a lead as a sale, the numbers you entered would automatically be available in your production numbers for the current day. Once you have verified and entered your numbers for the day this information will be available in Enter Daily Production in Impact Desktop. All user levels will have access to this option.

From the main menu, tap Enter Today's Production, tap , update your numbers in the appropriate sections, and tap to save the data.

Note the current day is only available for this function so you must edit and save on a daily basis.



- **Mobile Activity**

o Total Calls - Total number of calls made through the phone

o The following are totals of the dispositions made by the user through the phone for the day

1. No answer
2. Callback
3. Left message
4. Presentation refused
5. Bad phone number
6. Set appointment
7. Drop by
8. Do not contact

- **Appointments**

o Start - Number of appointments at the beginning of your day

o Finish - Number of appointments you ended the day with

- **Presentation**

o Total - Number of presentations you gave this day. This

number should reflect the total number of
referral, POS, Response Card, Lapsed POS, List lead, and Child Safe presentations.

o Response Card - Number of Response card presentations
o Referral - Number of referral presentations
o Childsafe - Number of childsafe presentations
o POS - Number of POS presentations
o LPOS - Number of LPOS presentations
o List - Number of List presentations

• **Referral**

o Collected – Number of referrals collected this day
o Live – Number of referrals that are in your working area

• **Live Lead**

o Start - Number of live leads in the users lead account at the start of the day
o Finish - Number of live leads in the users lead account at the end of the day

• **Appointments Booked**

o Drop by - Number of drop by appointments booked
o Home - Number of appointments booked from the customers' home
o Car - Number of appointments booked from the car

• **Next Day**

o Start - Number of appointments scheduled for the next day at the start of the day
o Finish - Number of appointments scheduled for the next day at the end of the day
o Referrals - Number of referrals collected today that have appointments scheduled for the next day

• **Sales**

o Total - Number of sales made by the user. This number must reflect the total of referral, POS, Child

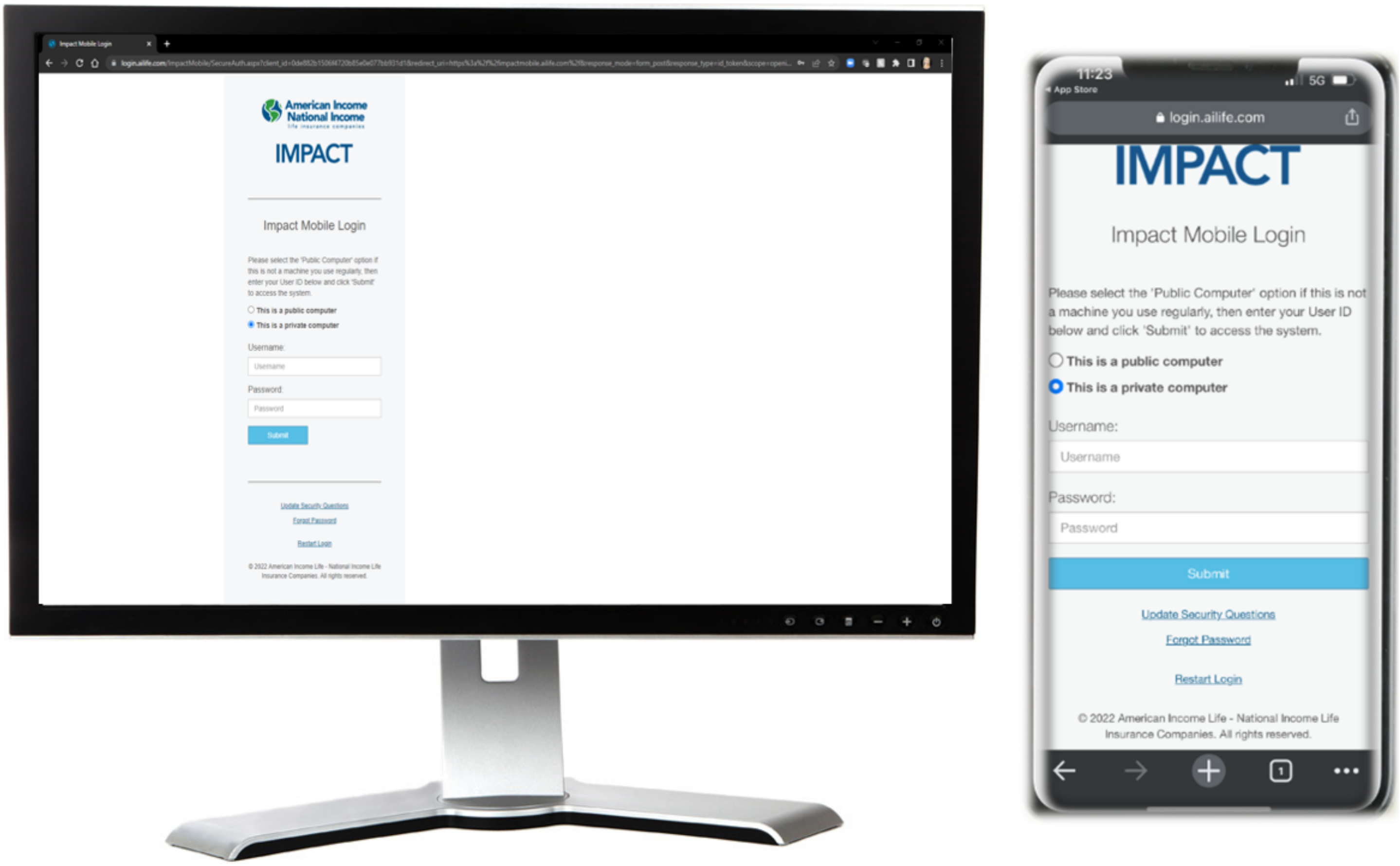
Safe, lapse POS, response card, and list lead sales.
o ALP - ALP production from the sales
o A&H - A&H production from the sales
o Response Card - Number of response card sales
o Referral - Number of referral sales
o Childsafe - Number of childsafe sales
o POS - Number of POS sales
o LPOS - Number of LPOS sales
o List - Number of list sales
• **Personal Recruits**
o Total - Number of personal recruits for the day
• **Resolution Detail**
o Total Res. - Total number of resolutions for the day
o The following are totals of the resolutions made by the user that day
1. Pres. No sale
2. Pres. Refused
3. Bad phone #
4. Moved
5. Sale
6. Duplicate
7. Over-age
8. Misc.
9. Do not contact

3.3.7. My Conservation and MODs

Conservation and Mods- Video Walk Thru (coming Soon)

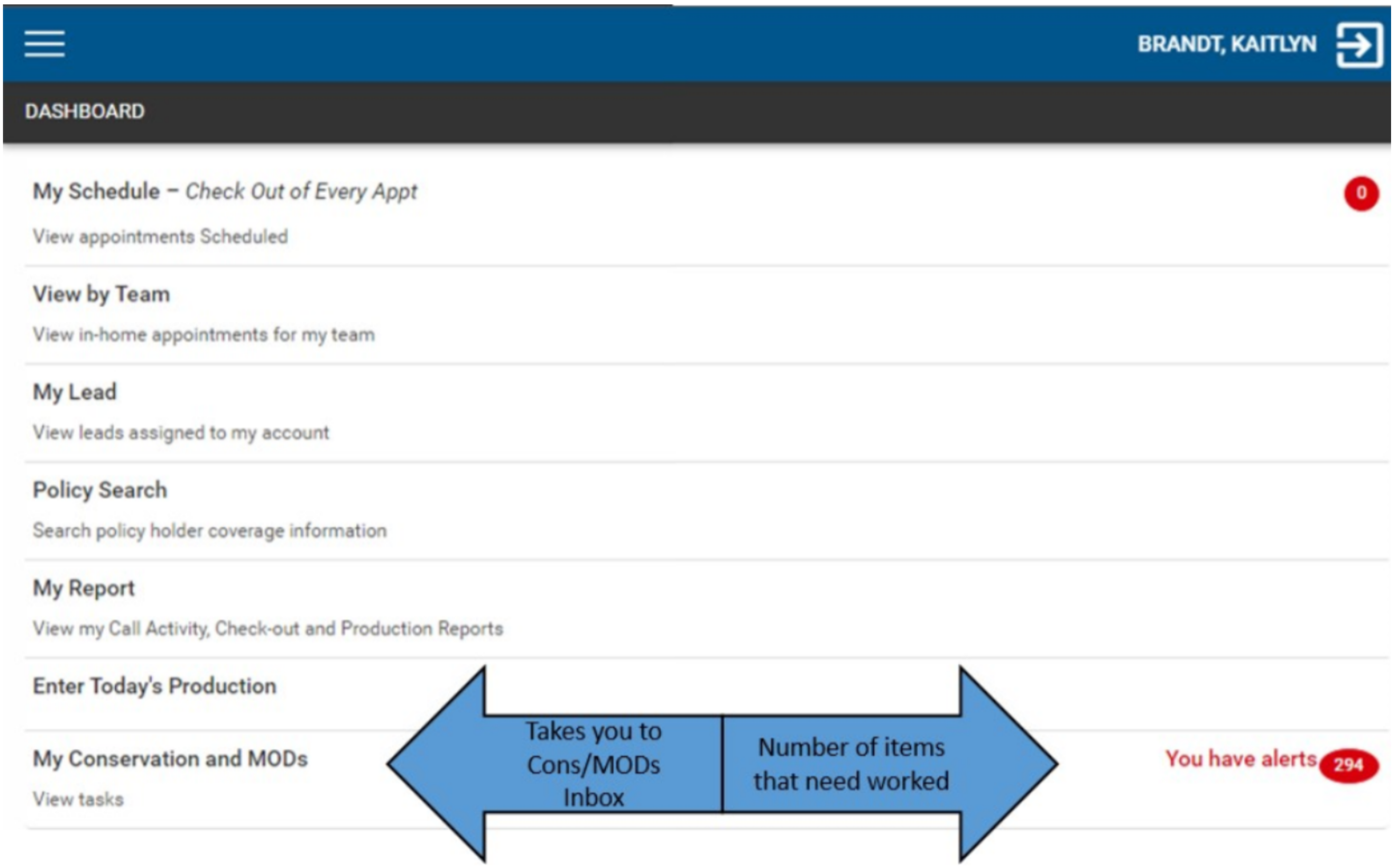
Log into Impact **Mobile** on a computer or smart phone (Conservation and Mods is NOT in Impact Desktop)

- https://Impactmobile.ailife.com



3.3.7.1. How to Read the Dashboard

How to Read the Dashboard- On the dashboard you will be able to see how many active assigned items you have to work and can access your in box by clicking My Conservation and MODs



3.3.7.2. Your In Box

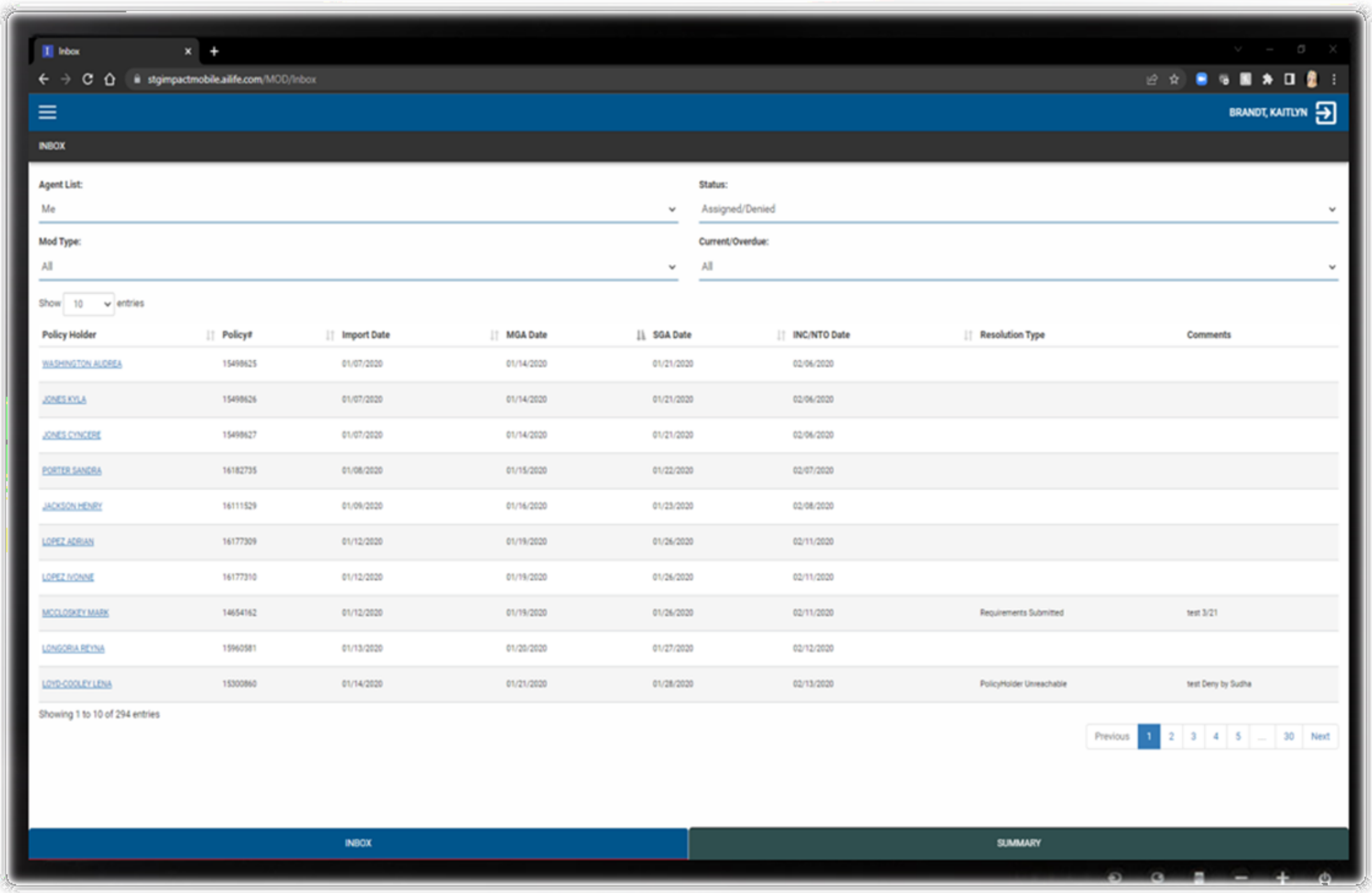
The in box will automatically open to these filters:

- **Agent list** - Me
- **Status** - Assigned/Denied
- **Mod Type** - All
- **Current/Overdue** - All
- Default view of 10 assignments

- You will be able to expand this to see 10, 25, 50, or 100 items at a time.
- You will see the
  - Policy Holders Name
  - Policy Number
  - Import Date

- MGA Date
- SGA Date
- INC/NTO Date
- Resolution Type
- Comments

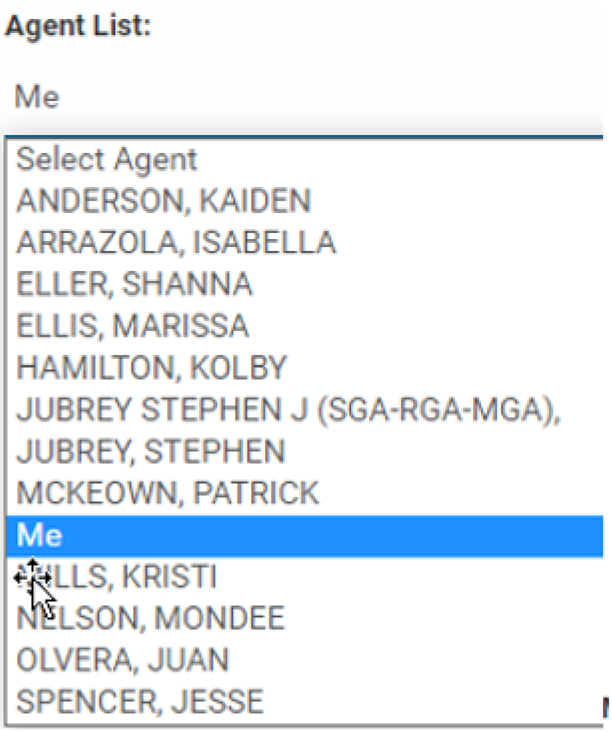
You will click on the Hyper Linked Policy Holder Name to see and review the details needed to work the conservation or MOD letter



3.3.7.3. Filters Defined

There are 4 filter options for your Conservation and MODs inbox

- **Agent List** – if you are in leadership this drop down menu will show all active agents in your hierarchy

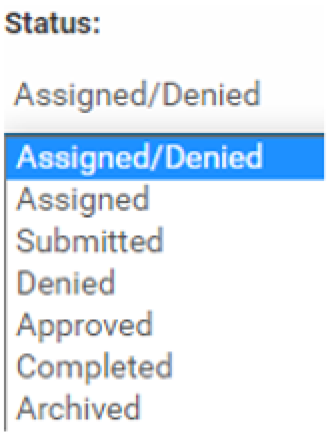


- **Status**
  - **Assigned/Denied**
    - All items that need attention. These will be new items and items that have been returned to you by your local Admin that need more attention and additional information. You will see a note from the Admin stating what else is required to complete this item.
  - **Assigned**
    - These are all new items that need attention and need to be worked and submitted to your local Admin through Impact.
  - **Submitted**
    - These are all items that you as the field agent have worked and gathered the

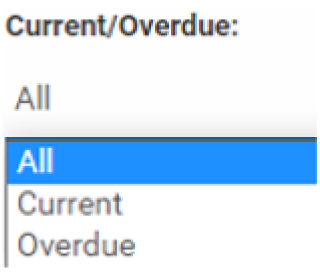
necessary requirements to continue processing and/or restoring the policy. You will be able to see any attachments/notes/phone calls that have been made.

- **Approved**
  - These items have been reviewed and approved by your Local Admin and are being processed with Home Office (whatever department is necessary for completion of the policy).
- **Completed**
  - These are items that you have submitted everything required to your local Admin and they have processed through Home Office and is now in a Normal Premium Paying and/or true cancelation status.
- **Archived**
  - These are all items that have been completed and are kept for record for the Local Agency.

- ation. Please make sure to look through all letters and identify so you are able to work correctly. Letters that are in another language may also be assigned through MISC letters.



- **Current/Overdue**
  - **All**
    - These are all items new and old
  - **Current**
    - These are all items that have not surpassed the INC/NTO date
  - **Overdue**
    - These are all items that have surpassed the INC/NTO date



3.3.7.4. Mod Type Definitions

MOD Type Definitions

- **All**
  - These are all items that are imported to Impact daily

- **MODs**
    - These items require one or a combination of a Signed Amendment/RT-99/COD – needing an agreement and most time a signature from the client (placing a rating at delivery of policy)
- **Underwriting Bulletin**
    - These are actions where agent help is needed i.e. Scheduling a medical exam/ doing a prescription verification or an interview with an underwriter/ having an additional addendum or questionnaire filled out/ conducting a 1-800 call/ obtaining medical records (APS)/ or oral swab (for in person sales)
- **Bad Check Alert**
    - These letters are a notice that the draft for a new application has come back as unable to be paid. This will require new banking information to continue processing the application.
- **Returned Items**
    - These letters generate when a policy that has been issued has missed a payment you will need to obtain either new banking information or verify that it is okay to redraft the same account and submit the

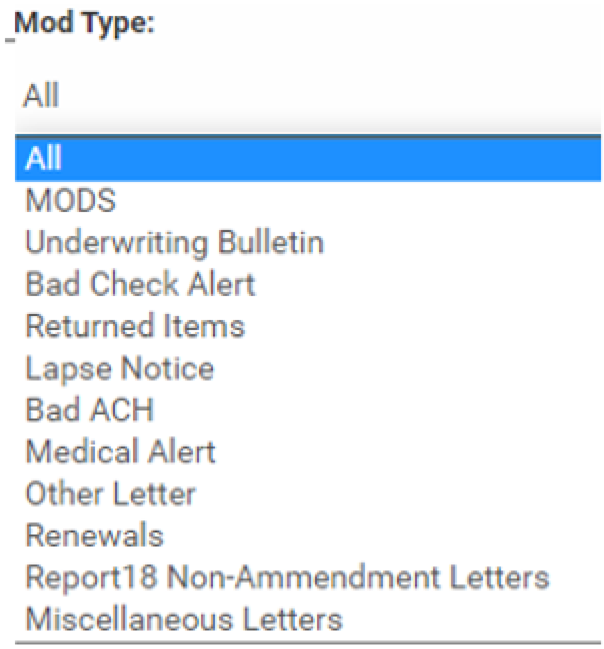
required paperwork.

- **Lapse Notice**
  - These are also known as 40 or 45 day notices. These notices are generated when a policy holder has missed a payment and the policy is now outside of its grace period. You will need to obtain the paper work necessary and signatures as needed to reinstate the case.

- **Bad ACH**
  - These letters are generated for new business applications that have come back with the initial payment unpaid. You will want to reach out to the client and let them know that the initial draft for their application was redeposited and we will try and draft in the next 7-10 business days. If a different bank account is to be used please fill out the required paperwork for your Admin to process.
- **Medical Alert – This is being removed disregard this folder.**
- **Other Letter**
  - Any of the above or below letters could fall into the other letter category if there is a difference in formatting of the letter or

placement of information. Please make sure to look through all letters and identify so you are able to work correctly. You will also see copies of the notices that are sent to clients in here so you have them for record.

- **Renewals**
    - These are copies of notices that are sent to clients that they have a type of coverage that is up for a renewal date and/or add on date. IE – Child Rider (life and/or A&H 21st birthday conversion)/ GIO/ Renewable and Convertible term coverage
- **Report 18 Non-Amendment Letters – This is being removed disregard this folder.**
- **Miscellaneous Letters**
    - These letters are assigned to you by your admin these will include pending reinstatements and policy address updates.
    - These may also include any of the above letters could be in this folder if there is a difference in formatting of the letter or placement of inform



3.3.7.5. In Box Columns

In your inbox there are 6 identifying columns for each item

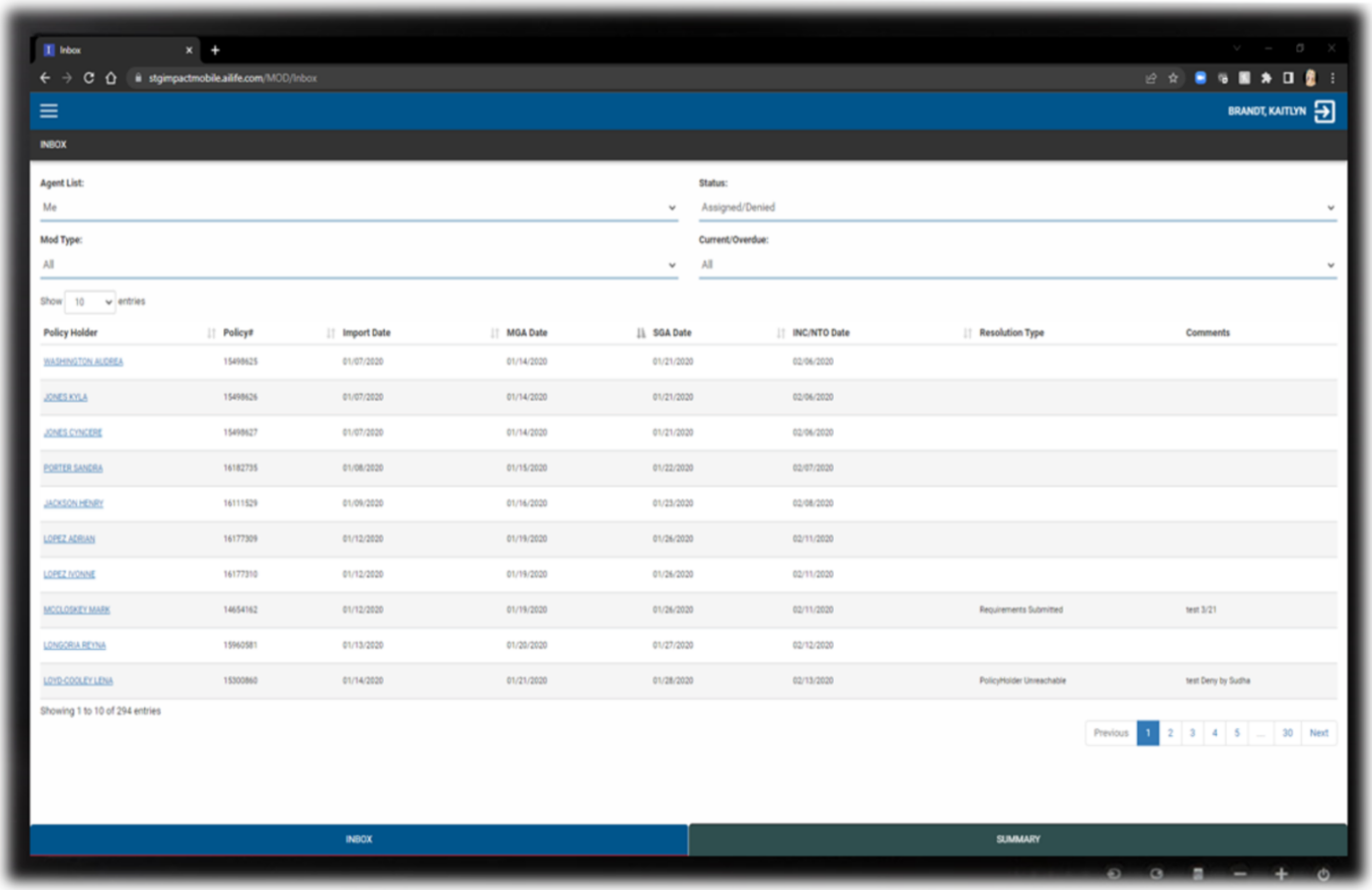
- **Import Date**
  - This is the date that the item was generated and imported into Impact for you to start working.
- **MGA Date**
  - This is the date selected by your SGA/Agency Owner that a copy of your Conservation/MOD item will automatically share with your MGA. You and your MGA will both have a copy of the item and be able to work at the same time. If your MGA completes before you the case may be subject to recoding (speak with your MGA/RGA/SGA for individual office guidelines.)
- **SGA Date**
  - This is the date selected by your SGA/Agency

Owner that a copy of your Conservation/MOD item will be shared with an Agency Conservation Specialist(s). The case may either be shared with the Conservation Specialist(s) or reassigned away from the writing agent. If the Conservation Specialist completes before you the case may be subject to recoding (speak with your MGA/RGA/SGA for individual office guidelines.)

- **INC/NTO Date**
    - This is the date assigned by Underwriting and/or Policy Issue that the requirements must be completed and submitted to the correct department by or the case will not issue and will cause a charge back on advance. If a case is completed by obtaining the requirements needed after this date the correct paper work to Reopen the case will be required alongside any MODs or Underwriting Bulletins.
    - These cases may and most times will be reassigned to an Agency Conservation Specialist and upon fixing the case are subject to recoding (speak with your MGA/RGA/SGA for individual office guidelines.)
- **Resolution Type**
    - A case that has previously been submitted to the Agency Admin for processing and has be Denied OR has been submitted will show how

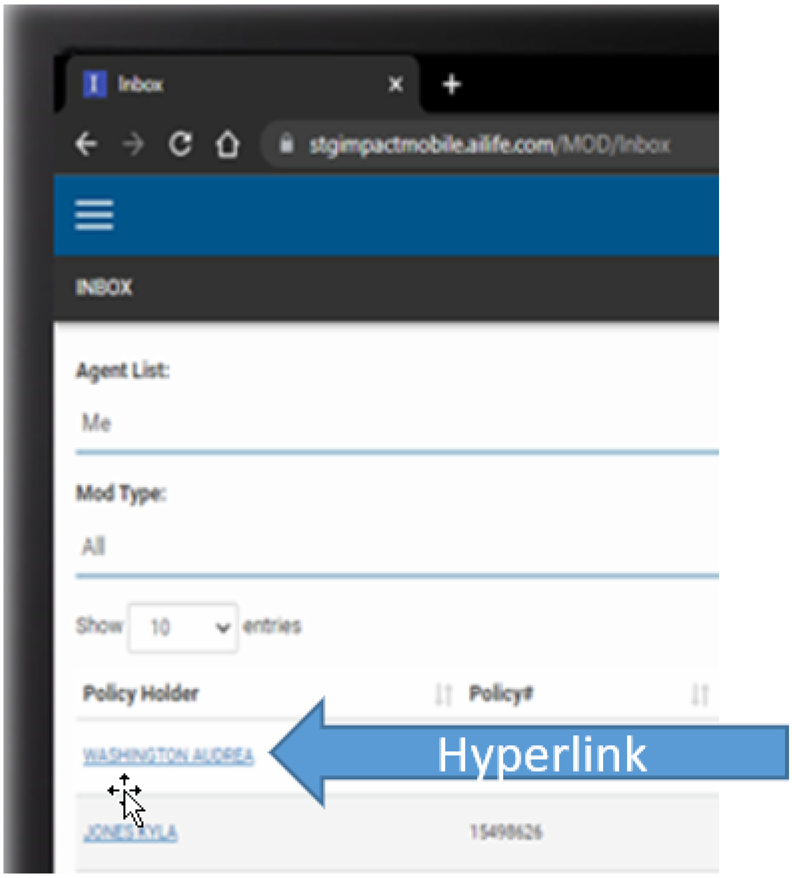
the case was resolve upon submitting.

- **Comments**
  - Comments that are added when submitting an item to an admin OR a case that has been denied by the admin will show. The most recent comment that has been added will be the default view.



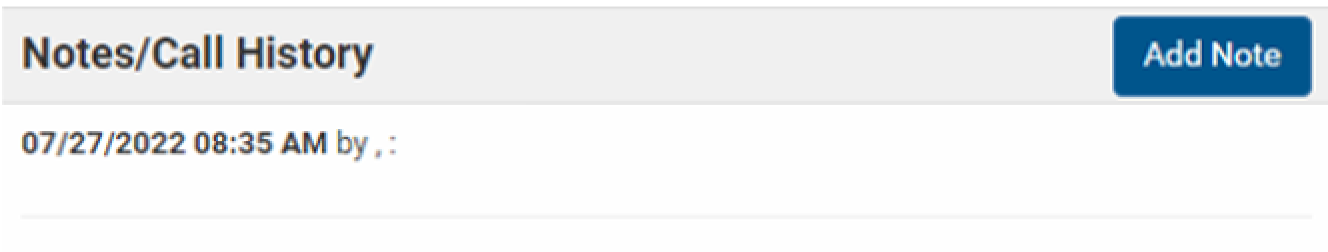
3.3.7.6. Individual Item Display Screen

From the inbox screen clicking on the hyper linked policy holder name it will bring you to a policy overview.



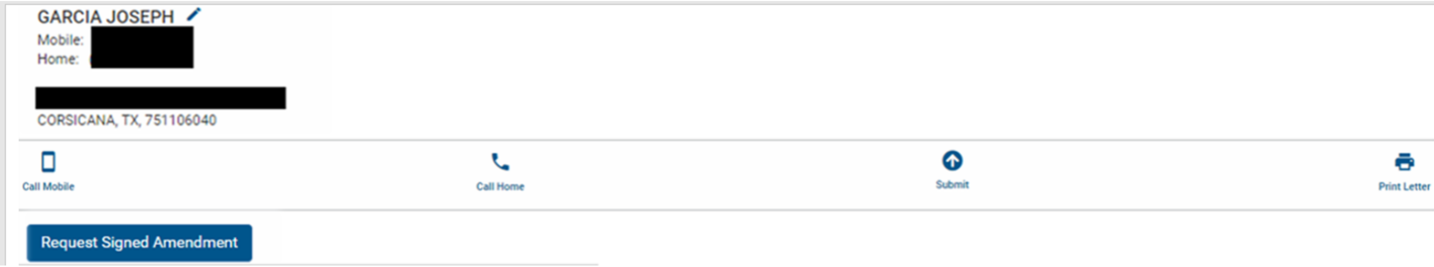
You will have the option for the below functions

- Edit policy holder phone numbers
- Call mobile- This will be recorded and logged
- Call home- This will be recorded and logged



- Submit the needed requirements
- Print the letter (download) that will need a signature or you need to be able to complete the action required
- Request signed amendment if not attached in print

letter



The display screen that you see is what is known as the “Cover Letter” split into 5 sections – or the information needed to place the correct requirements as required by PI to complete the policy issuing process

Policy Info	
Policy#	17596128
MOD Type	MODS
Import Date	05/13/2022
Complete By	05/16/2022
Action	
Needed	Prem Miscalc,Signed Amendment
Primary Rated	Yes
Other	$5K WLUW AND MEDICAL RECORDS DATED 8/2/21
Amount	
COD	$44.60
RT99	
Refund	
Rating	
Primary Rated	Yes
Spouse Rated	No
Reason	Resp,Weight
Other	
Misc	
Source of Info	Doctor,Qair
Abnormal	
Deleted	10 Yr R&C,ADB/2000,TIR
Reduced Face	False
Question	
Reason for Delete	
Person(s)	

Policy Info

- **Hyper-Linked policy number**
  - This will allow you to view the details of

the policy such as coverage amounts like a typical policy overview screen you would see in Impact when you are assigned a policy holder as a lead. As well as any associated household policies

- **MOD Type**
  - This will tell you what letter type needs to be worked
- **Import Date**
  - This is the date that the item loaded into Impact
- **Complete By**
  - This is the date that you will need to complete the requirements by

- **Action**
  - **Needed**
    - This will list the requirements you will need to obtain from the client i.e. Signed amendment, RT-99, COD
  - **Primary rated**
    - This will say yes or no based off of if Underwriting has assigned a rating to the coverage or not
  - **Other**
    - This will provide a brief description with regards to actions taken by or information

gathered by underwriting that led to the risk classification assignment I.E. medical records, exam, questionnaires, previous applications and or current policies

- **Amount**
  - **COD**
    - Collect On Delivery – this is the difference between the quoted premium and new premium with the risk classification added in.
  - **RT-99**
    - This will tell you the reduction in coverage if an RT-99 is offered
  - **Refund**
    - This will tell you the amount returned to the client in the case that only a reduced counter offer is made to the client that is less in premium than the original quoted amount
- **Rating**
  - **Primary rated**
    - This will say yes or no based off of if Underwriting has assigned a rating to the coverage or not
  - **Spouse rated**
    - This will say yes or no based off of if

Underwriting has assigned a rating to the coverage or not if the spouse also applied for coverage

- **Reason**
  - this will give a description as to the reason that the client has received the risk classification
- **Other**
  - This is any additional information needed to properly explain the adjusted coverage or premium to the client

- **Misc**
  - **Source of Info**
    - This will state where the information was obtain from that underwriting used to make their decision I.E. Doctor. Qair. ETC.
  - **Abnormal**
    - If an exam was conducted and the tests came back abnormal
  - **Deleted**
    - This will state if coverage has been deleted due to underwriting action and the addition of a risk classification
  - **Reduced Face**
    - This will say true or false if the face amount of the policy (coverage amount) has been

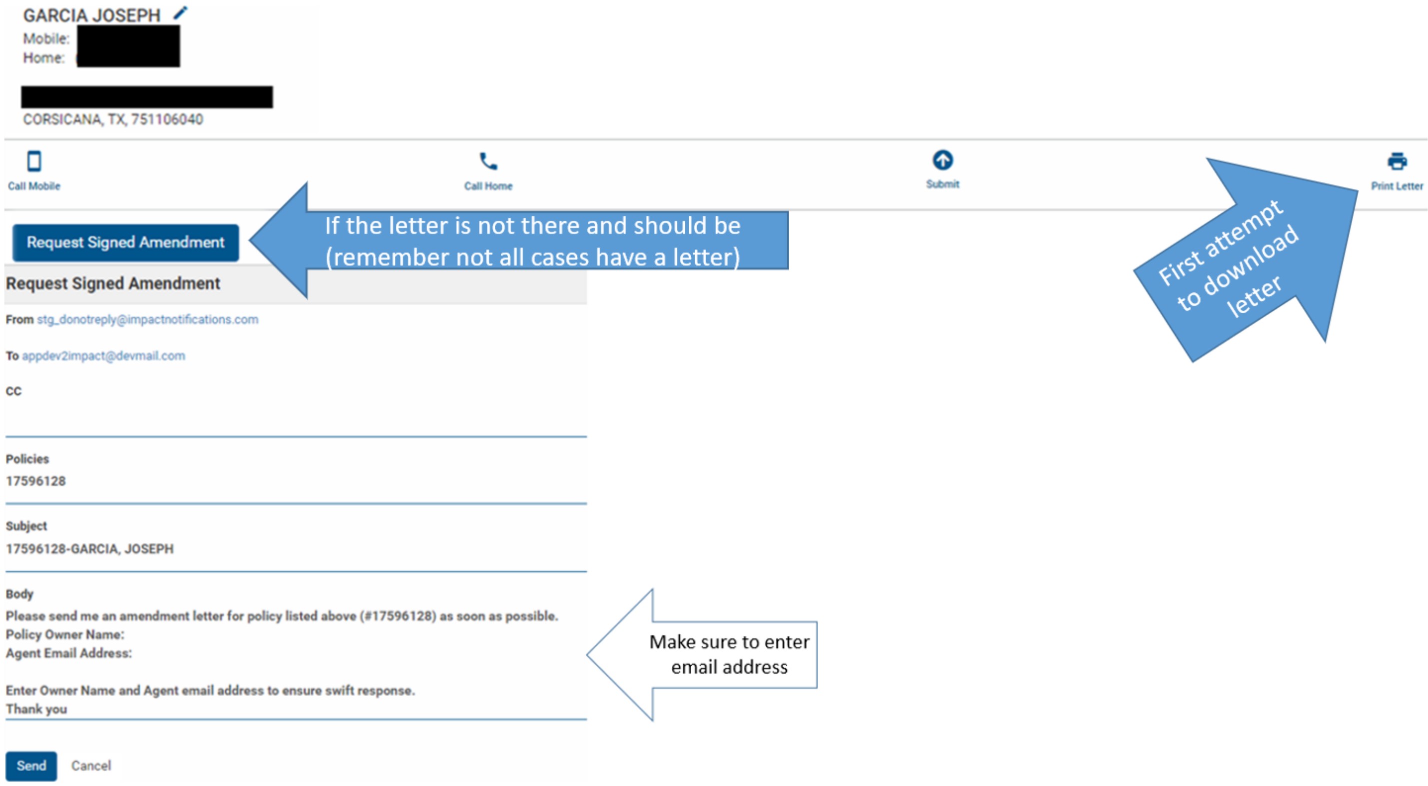
reduced

- Question
- Reason for Delete
- Person(s)

3.3.7.7. How to Request a Missing Signed Amendment or RT-99

Requesting a missing signed amendment

- If you click on print letter and it says there is no MOD available your next step will be to click on the Blue Request Signed Amendment button
- This will bring up a new screen that has a format of an email – with some prepopulated fields
  - Sending email
  - To email
  - Policy number
  - Subject – Automatically policy number and insured name
  - Body of the email
    - *you will need to input your email where it says agent email address*



Example of attached letters needed to work Conservation/MOD item

MODIFICATIONS
ATTACHED TO AND FORMING A PART OF POLICY NUMBER 17596128.

THE PROVISIONS CONTAINED HEREIN TO TAKE EFFECT AS OF THE DATE OF ISSUE UNLESS A DIFFERENT DATE IS SHOWN HEREIN.

THE APPLICATION FOR THIS POLICY IS HEREBY AMENDED AS FOLLOWS:

THE PREMIUM AMOUNT INCLUDES AN ADDITIONAL RISK CLASSIFICATION PREMIUM.

10YR RENEW/CONVERT LEVEL,ACCIDENT DEATH BENEFIT,TERMINAL ILLNESS RIDER IS / ARE EXCLUDED FROM THIS PLAN.

THE CORRECT FACE AMOUNT OF WHOLE LIFE INSURANCE IS $5,000.

IN ALL OTHER RESPECTS THE PROVISIONS AND CONDITIONS OF THE POLICY REMAIN THE SAME.

AMERICAN INCOME LIFE INSURANCE COMPANY
WACO, TEXAS

I HEREBY AGREE THAT THESE CHANGES SHALL BE AN AMENDMENT TO AND FORM A PART OF THE ORIGINAL APPLICATION AND OF THE POLICY ISSUED THEREUNDER AND THAT THEY SHALL BE BINDING ON ANY PERSON WHO SHALL HAVE OR CLAIM ANY INTEREST UNDER SUCH POLICY.

SIGNATURE OF POLICY OWNER DATE SIGNED

April 11, 2022

#BWNMKRW
#0017 5961 28/2#
Joseph Garcia
[redacted]

Application Number Insured's Name
17596128 Joseph Garcia

We have almost completed action on your request for insurance, but must come to you for help. We mailed the policy to our representative and the coverage we are offering you is stated in that policy. To put the coverage into effect, we need your signature on an amendment and your check in the amount of $ 44.60.

The agent will be contacting you shortly. Enclosed is a copy of the original amendment. If you would like to secure coverage immediately, just sign the amendment and return it to us, along with your check, in the enclosed envelope. It is important that we receive them within the next fourteen (14) days.

If you have any questions, or if we can be of help in any way, please let us know.

Patty Ingram
Policy Issue Department

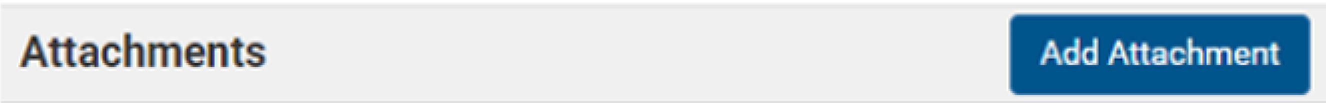
P.S. Please write your application number on the check or money order

CC [redacted] PI/TAB IC PIAMCD

3.3.7.8. How to submit your conservation items and adding an attachment

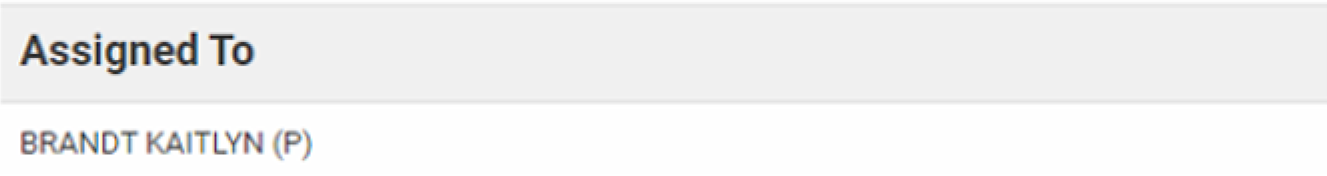
Submitting the requirements once obtained (resolving the Conservation/MOD notice)

- When submitting the requirements needed for a conservation/MOD item the first thing you should do is attach any documents that have been obtained and are required by your office and policy issue to complete the policy.

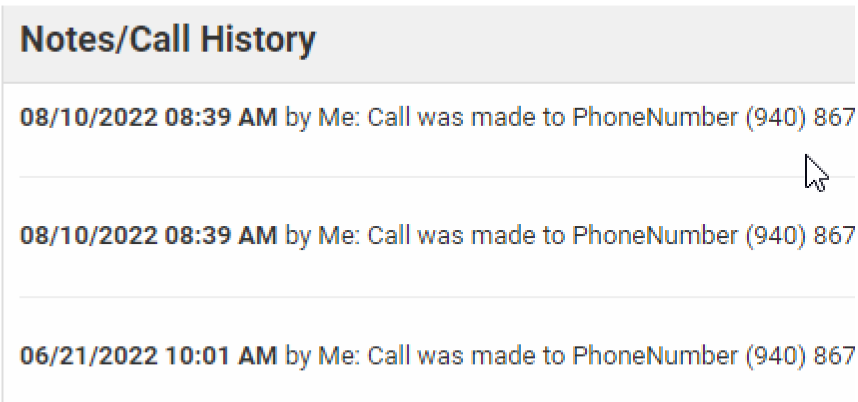


- The accepted formats for attachments are
  - .jpeg
  - .jpg
  - .png
  - .gif
  - .bmp
  - .pdf

- You will be able to see everyone who is assigned to work on each notification.



- Any and all actions taken on a not in Conservation and MODs will be noted becoming part of this permanent record. This will include
  - Time of action
  - Date of action
  - Person conducting the action
    - Call made
    - Note added
    - Apt set
    - Attachment uploaded
    - Resolution selected



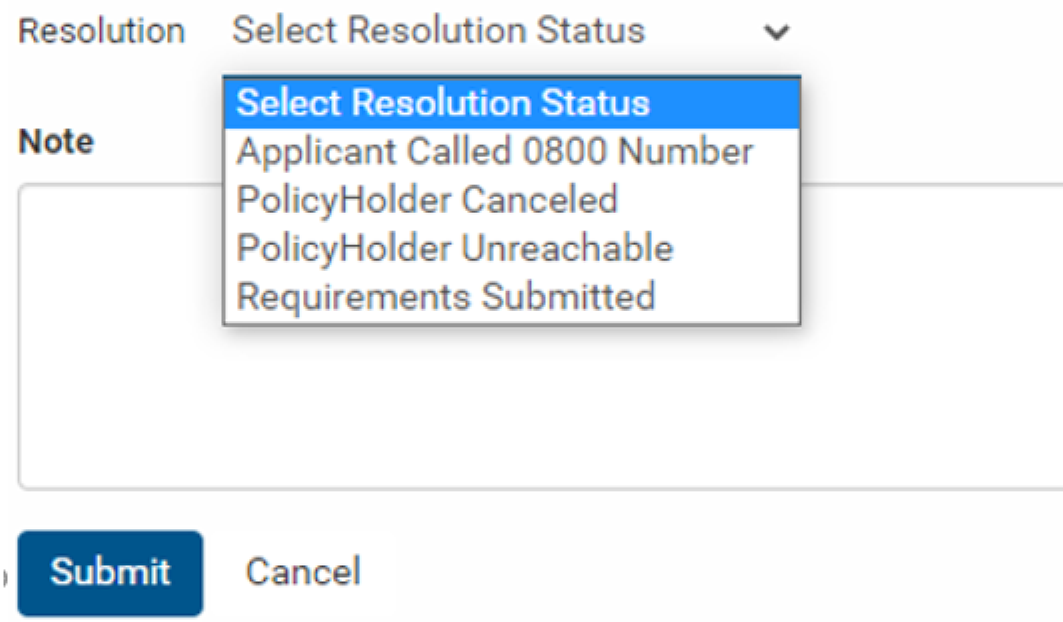
3.3.7.9. Resolutions

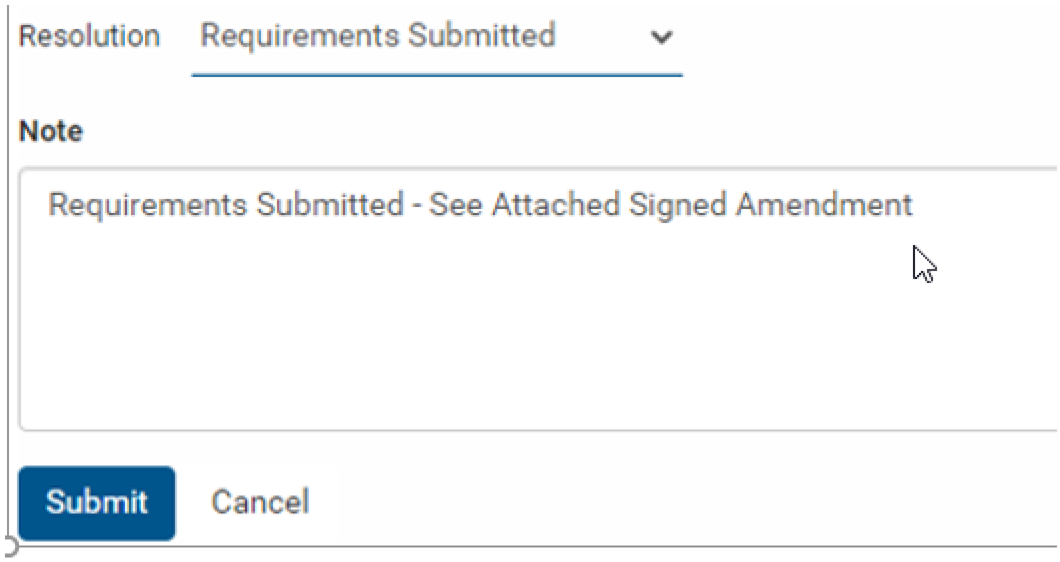
Selecting a resolution

- **Applicant called 0800 number**
  - You should select this resolution status if you had an underwriting bulletin stating that the client needs to call the 800 number. After you have spoken with the client and have confirmation this action has been taken.
  - Please ensure to add a note with the details of when the client completed the call day and time and any additional information they provide.
- **PolicyHolder Cancel**
  - You should select this resolution status if you have spoken directly with the client and they wish to no longer move forward with the application process and policy.
  - Please ensure to add a note with the details of why the client is wishing to cancel i.e.
    - Can no longer afford
    - Found coverage elsewhere
    - Refusal due to rating (premium increase is too much)
    - Decrease of coverage (due to risk classification)

- Refusal of medical exam

- **PolicyHolder Unreachable**
  - You should select this resolution status if you have tried multiple methods of contacting the policy holder and are unsuccessful such as
    - Calling
    - Texting
    - Emailing
    - Door knocking
    - Reaching out on social media
- **Requirements Submitted**
  - You should select this resolution status if you have spoken with the client and obtained everything that is required to complete the issuing process of the policy.
  - Please make sure to attach all documents necessary and add a note for your agencies admin with what has been attached and who you spoke with in the household.



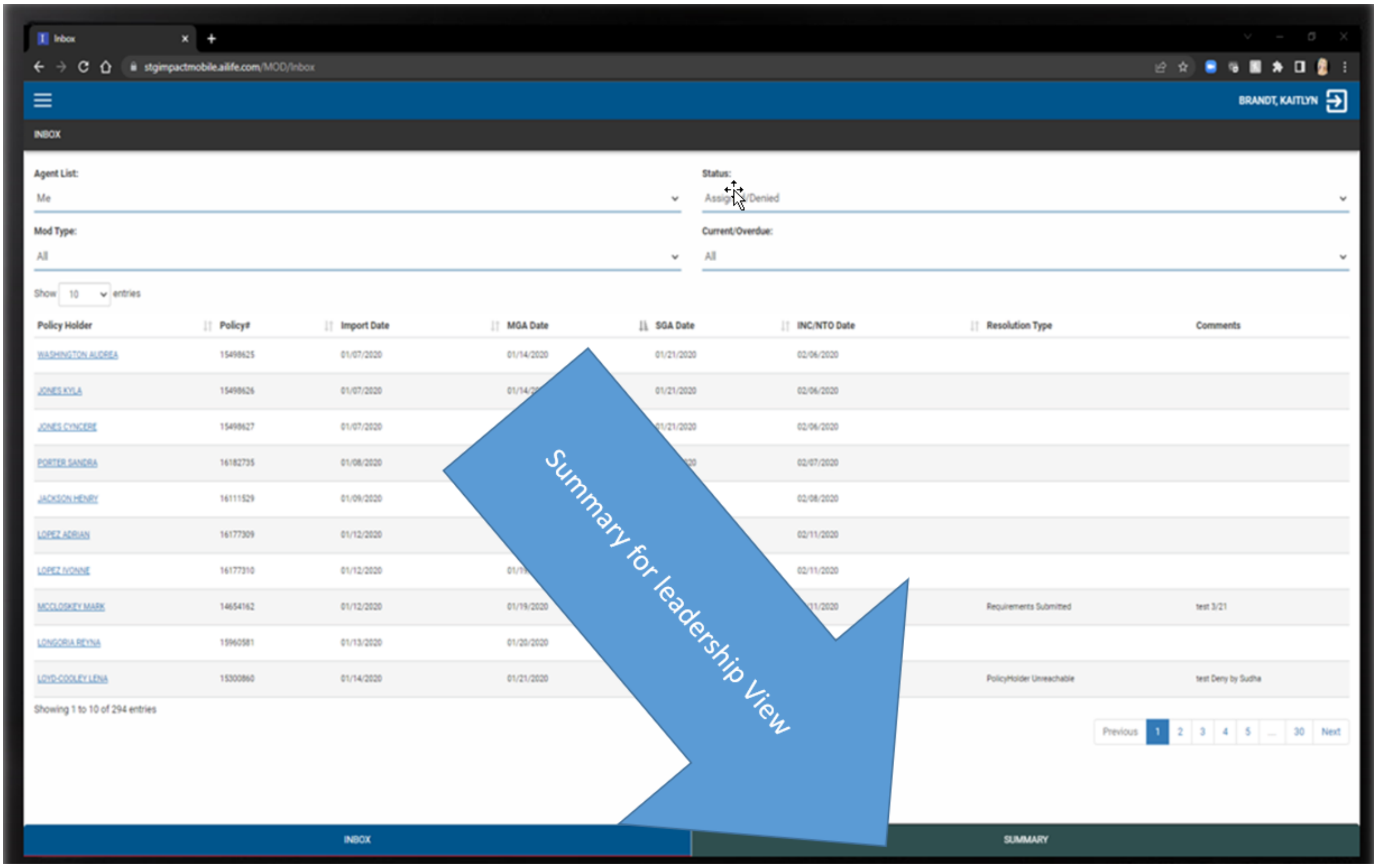


Once you have selected the correct resolution and added notes accordingly click on submit and a box will pop up stating that the MOD has been successfully submitted. This means that the Conservation/MOD item has been submitted for the agency admin to review and process.

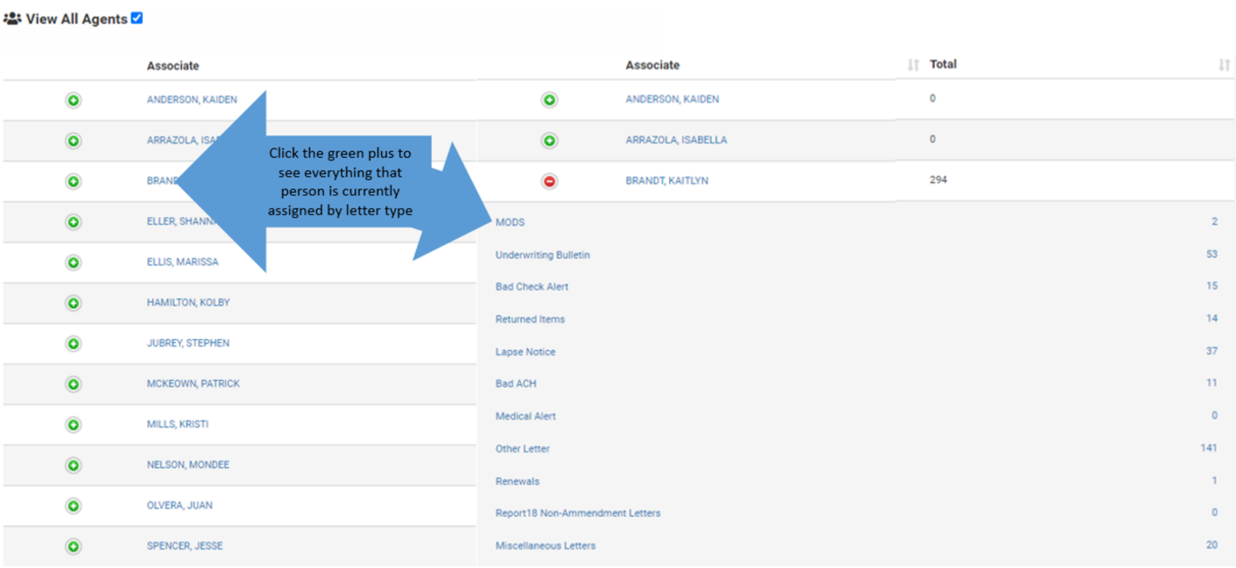
3.3.7.10. Leadership Team Summary

Leadership TEAM summary

- If you are in leadership you have the ability to look at your entire TEAMs assignments in one snap shot. At the bottom of your inbox there is a tab named summary once you click on that it will bring you to a new page.



Once on the new screen you will click the box beside <u>View All Agents</u>

- It will list every member of your TEAM with a green plus beside their name.
- Click on the plus to expand the section under that TEAMmember and you will see by letter type how many assignments that person has.
- 

3.3.8. Search by Phone - Last 4 Digits

Search by Phone - Last 4 Digits is used when a client returns your call and you want to search directly to the lead detail screen to take action on the lead. When a client calls back and would like to schedule an appointment, you should use the button that was used to get action on the lead to set your appointment. For example, if the client called back because of the text message, when you are on the lead detail screen and you would like to schedule the appointment, you should access the what happened screen using the Text button.

Call Mobile | Call Home | Send Text | Dropped By

Call - What Happened?

Set In - Home Appointment:

Set and send confirmation no reply text to the client.

Set Virtual Appointment:

Set and send confirmation no reply text and email with virtual meeting link.

Bad Number/Set Dropby Appointment:

Client cannot be contacted - Set a drop by appointment in your schedule.

Set Call Back Appointment:

Client cannot be contacted - Set a called back appointment in your schedule.

Left Message:

Left a voice mail for the client.

No Answer:

Client did not answer the phone.

Re-Schedule Appointment:

Client Set Appointment to another time.

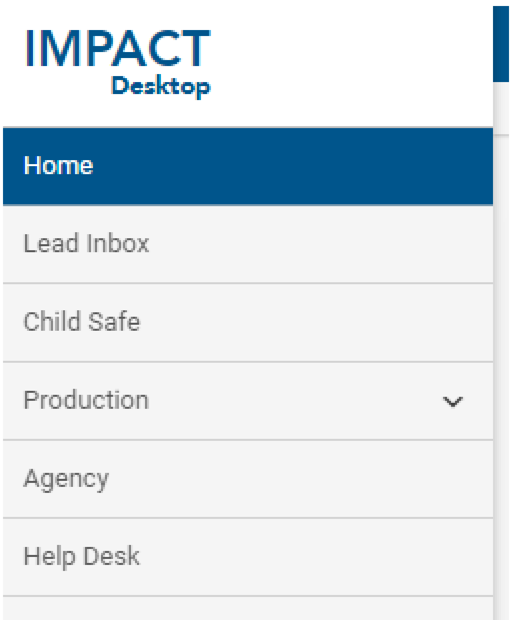
4. Impact Desktop

Impact Desktop was created and formated to improve an agents view using a personal computer. It is essentially a duplicate of Mobile with a few exceptions. Impact Desktop will be removed once all items that Desktop does that Mobile does not do are transfered into Mobile creating ONE agent tool.

Currently Impact Desktop does Not offer the Conservation and Mobile Tools

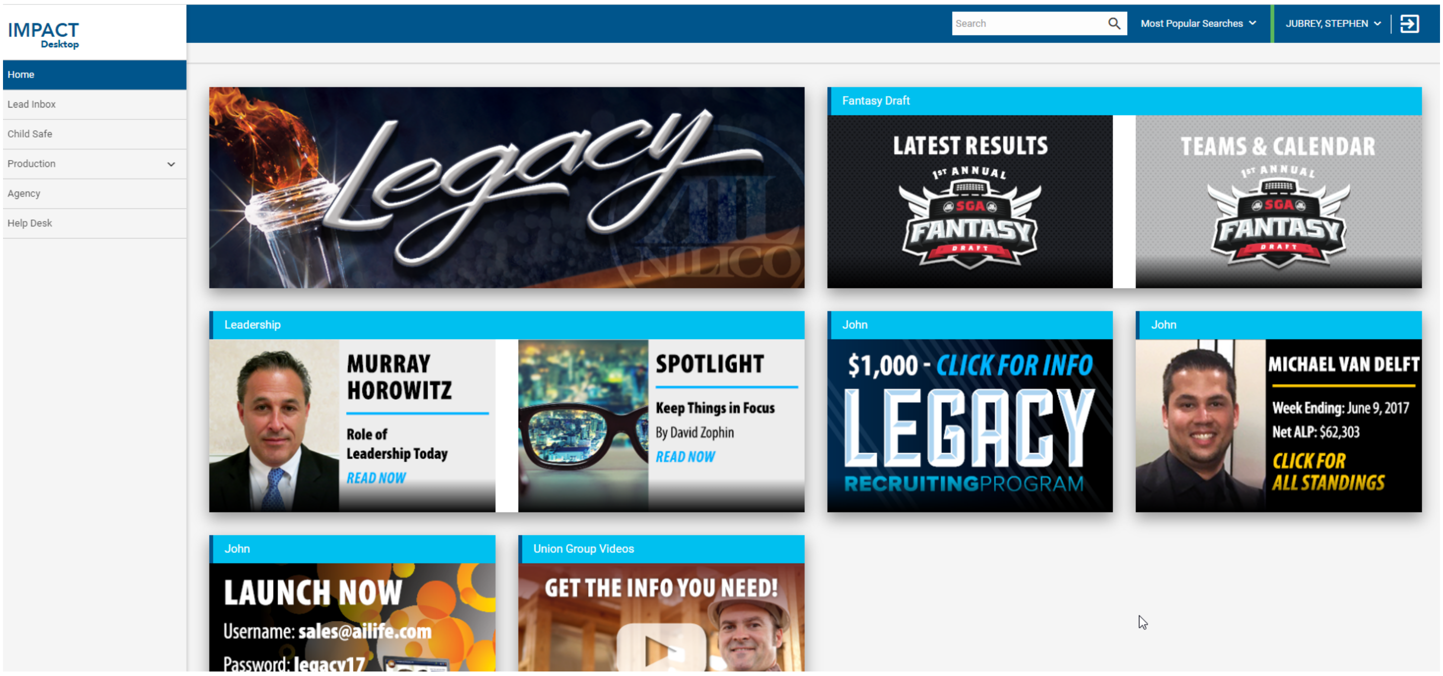
Impact Desktop has the following items that Mobile does not have. These will be created in mobile in the future.

1. Landing Page with news and other company information
2. Historical Schedules
3. Ability to change your time zone
4. User Documentation
5. Help Desk
6. Agency



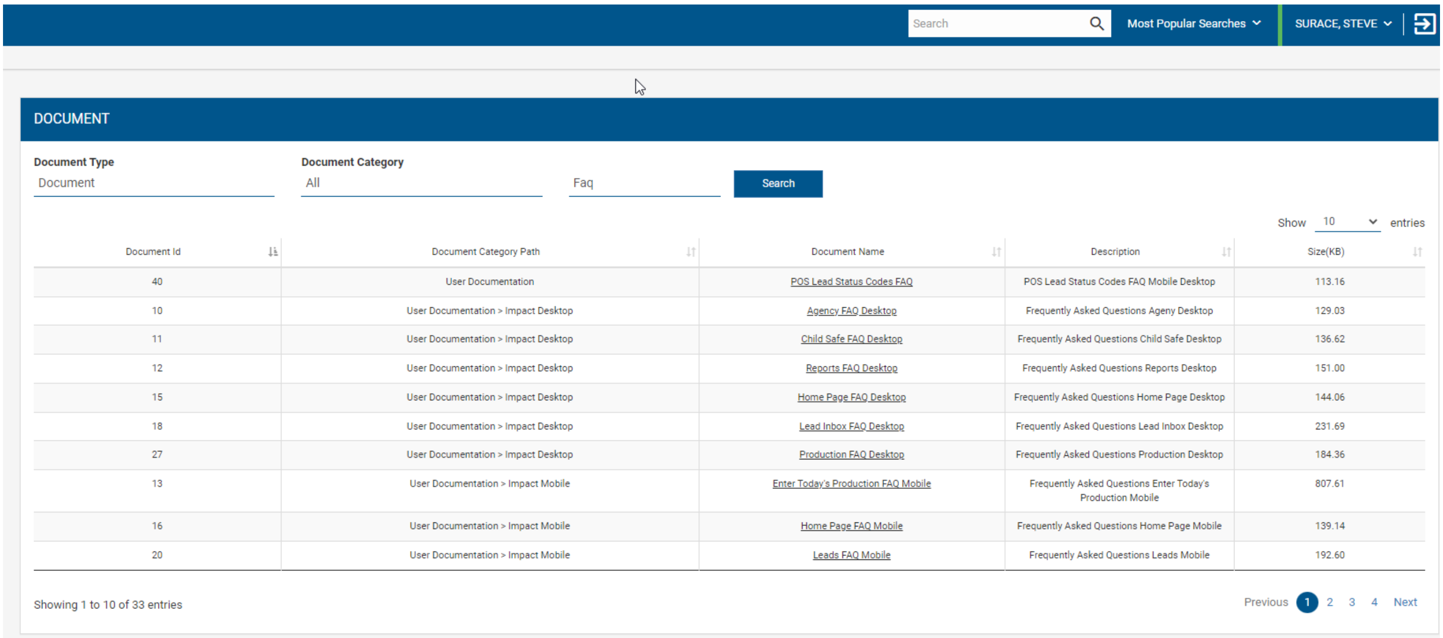
4.1. Landing Page

On the Home or Landing Page you will have access to the main menu items and you can access various news, training, and help articles.



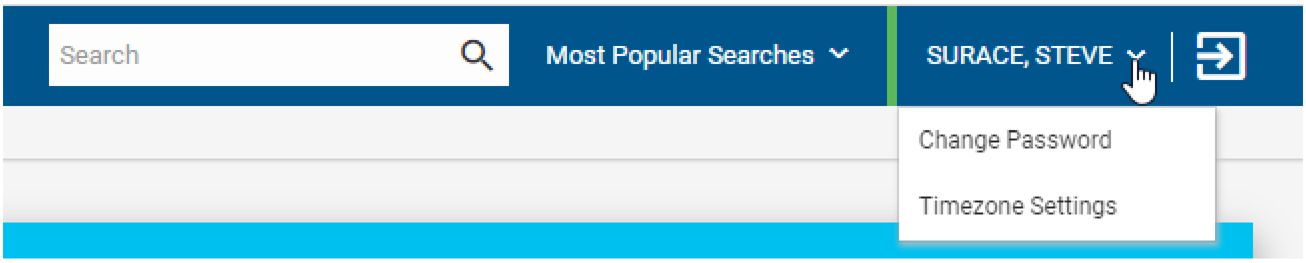
4.1.1. Documentation Search

Using the Search or the Most Popular Searches you can search for User Documentation files. (this is Not in Impact Mobile)

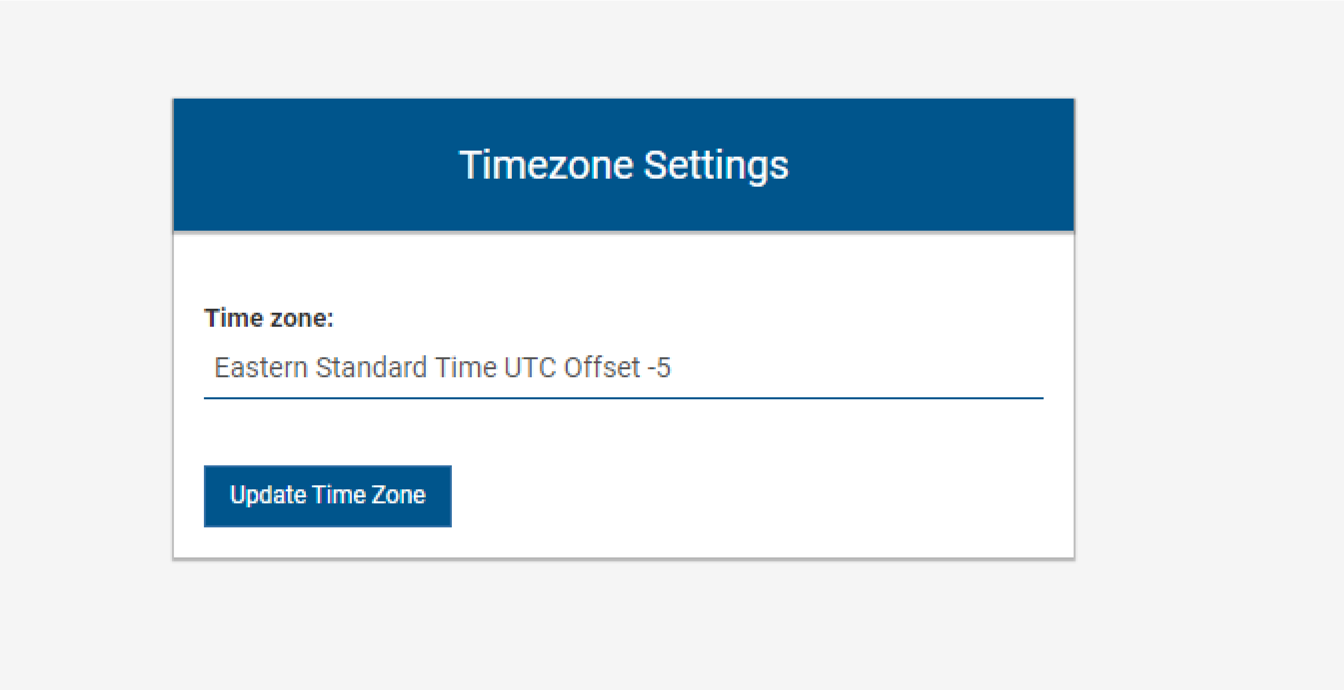


4.1.2. Change Password and Timezone Settings

In the top right corner of the Home Page, you can search for user documentation for Impact. You can also pull down the menus near your name to access the Change Password and Timezone Settings options. (you can NOT change your timezone from Impact Mobile)



It is recommended your time zone settings are changed based upon the time zone your are calling in from Mobile. This will ensure your reminder texts and emails are sent using the clients time zone and will prevent any confusion. When you change your time zone settings it is best practice to log out of Mobile and clear your cache so upon re entering Impact Mobile the new settings will be applied.

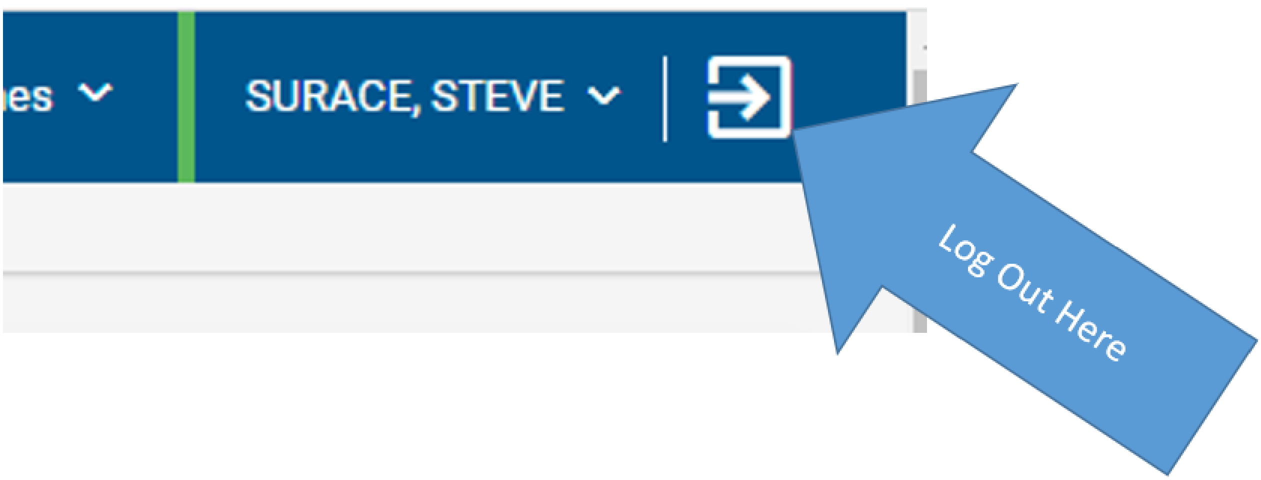


The time zone setting must be setup upon initial login. The time zone setting is critical for your Lead Inbox and setting appointments.

Locate your name on the home page, click the down arrow and select time zone setting. Select your appropriate time zone from the drop-down and click Update Time Zone.

4.1.3. Log Off Impact Desktop

The Right arrow will log you out of Impact Desktop.

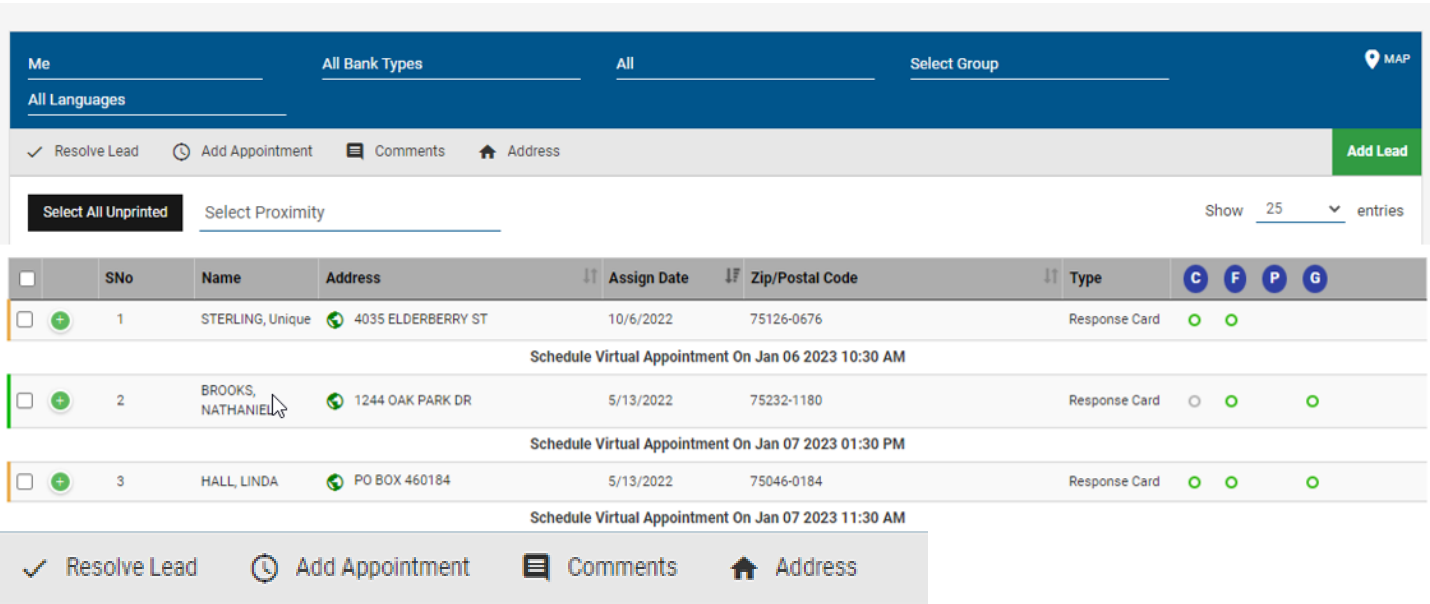


4.2. Lead Inbox

The lead in box is where you can view your lead resources, your team resources if your in management and your schedule and your teams schedule.

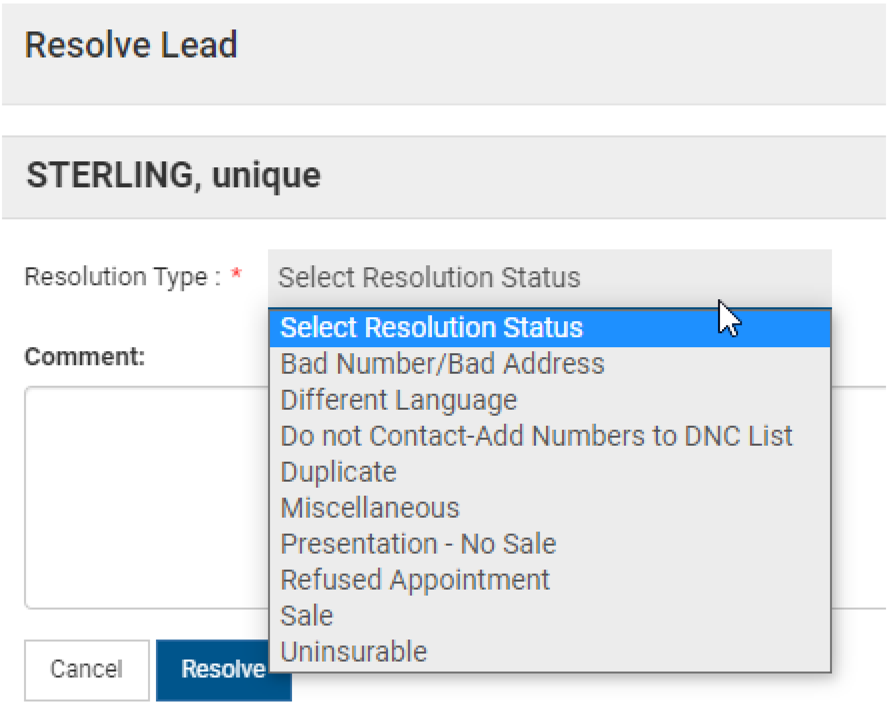
There are 2 views List view(default) and Map View

LIST VIEW



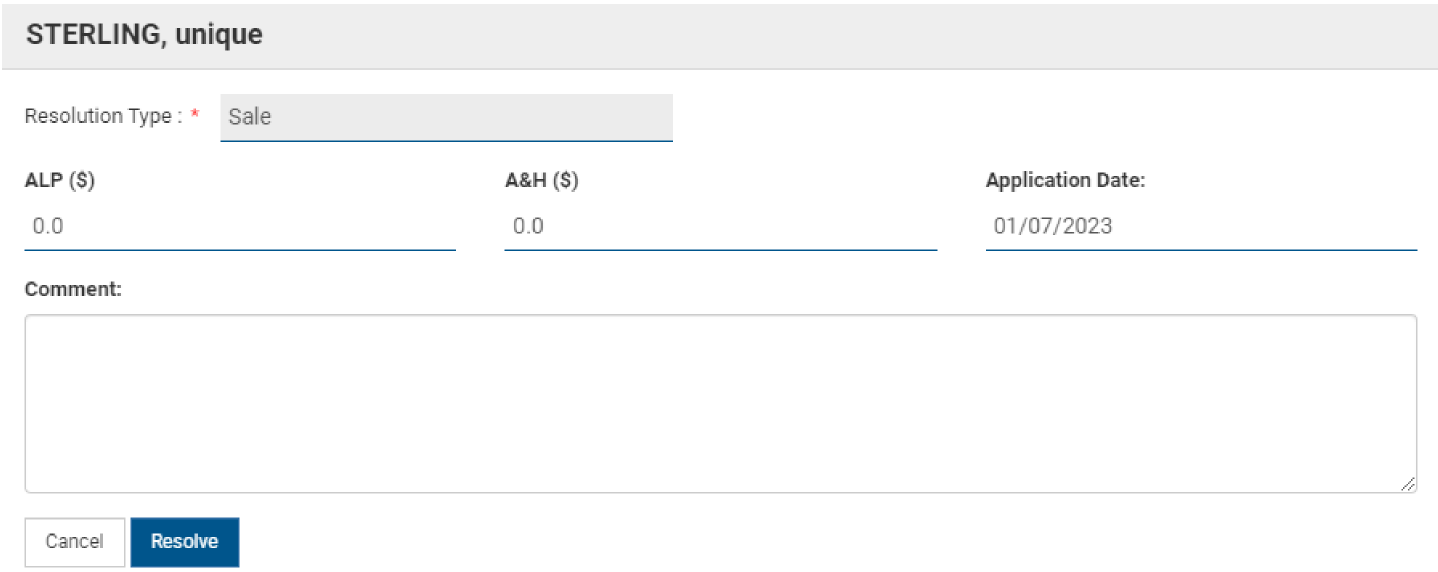
Resolve a Lead

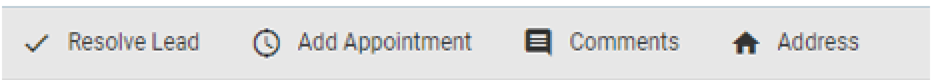
This option allows you to resolve a lead from your lead inbox.
Select the appropriate lead, click resolve lead, select the reason from the resolution type drop-down, enter any comments you have about the lead, and click Resolve.



Enter Production from a Resolved Sale

This option allows you to resolve the lead as a sale and enter your ALP and A&H production numbers for the sale. Select the appropriate lead, click resolve lead, select Sale from the resolution type drop-down, enter your production numbers and click Resolve.

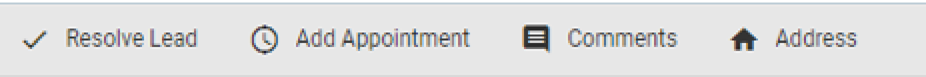




Add Appointment

This option allows you to schedule an appointment for the selected lead and add it to your schedule and also view the appointment history for the selected lead.

Select the appropriate lead, click add appointment, select the Appointment Type, select the location, select the day and time, add comments about the appointment, and click Create Appointment. The appointment will be added to your schedule.



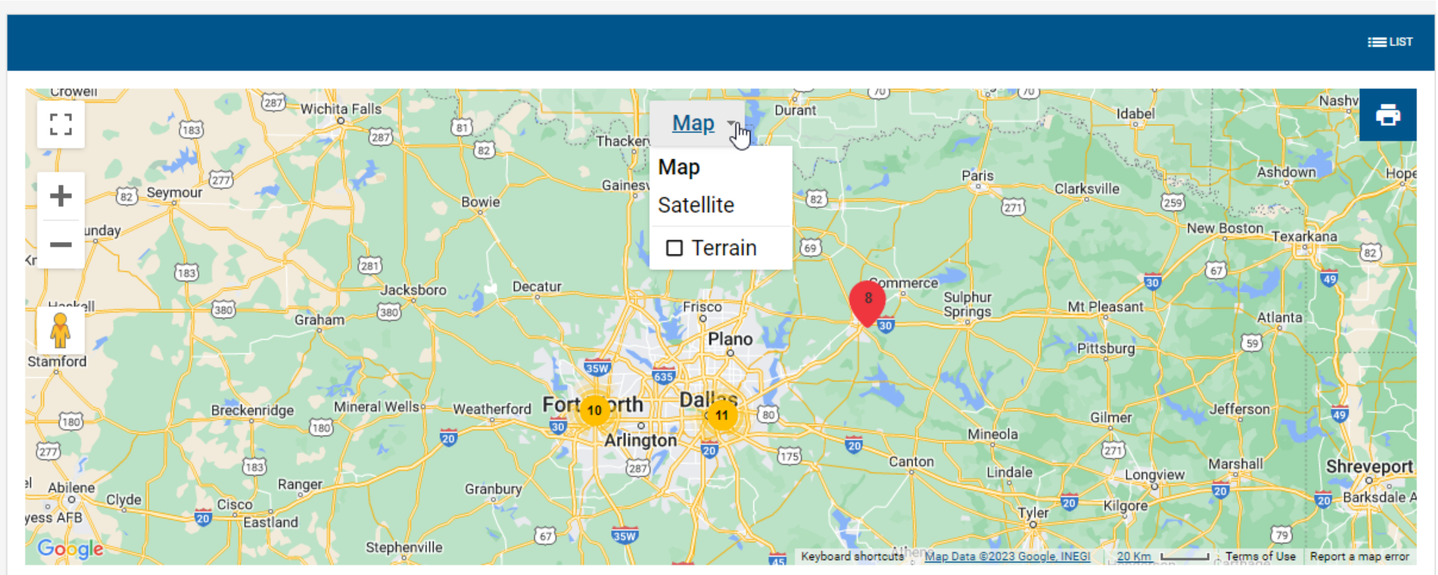
Add Comments

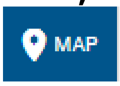
This option allows you to add a comment to the selected lead. You will also be able to view all of the previous comments
added to the lead.
Select the appropriate lead, click add comments, enter your comment, and click Add Comment.

Add a Lead

This option allows you to add a referral type lead to your lead inbox.
From the lead inbox, click Add Lead, enter the new lead information, and click Save. The new referral lead will be available in your lead inbox to schedule appointments.

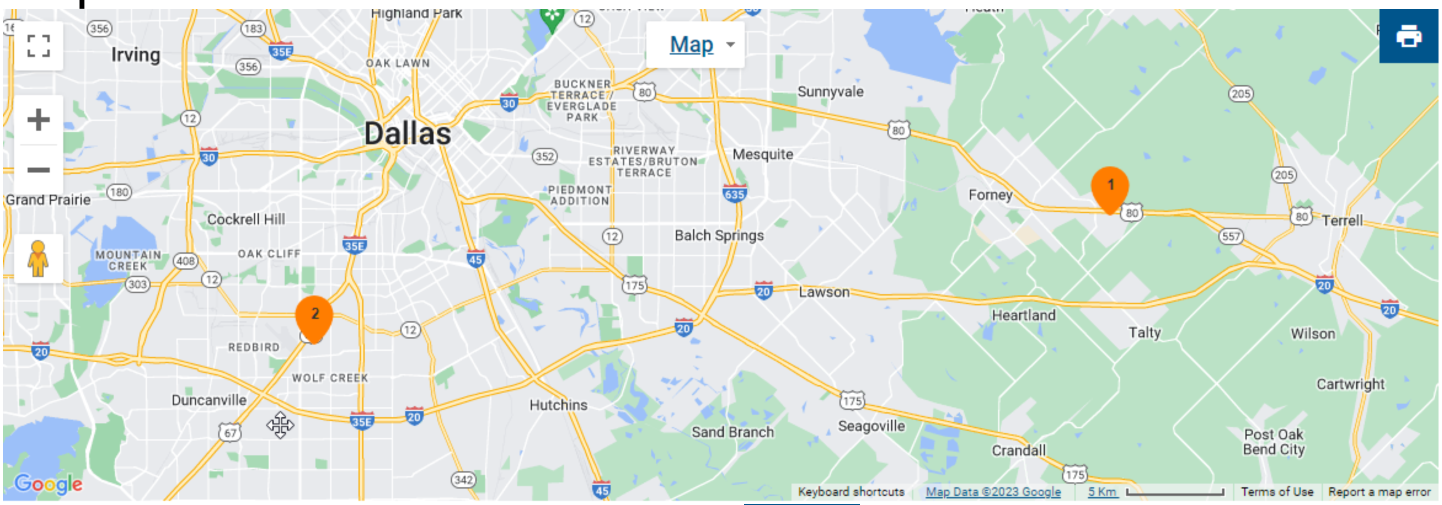
MAP VIEW- You van view the map with a terrain view or satellite view. You can view the street view by using the  Icon. The closer you zoom, clusters will break up into individual lead pins.

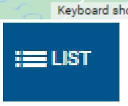


From the lead inbox, select the appropriate geocoded lead(s) and click .

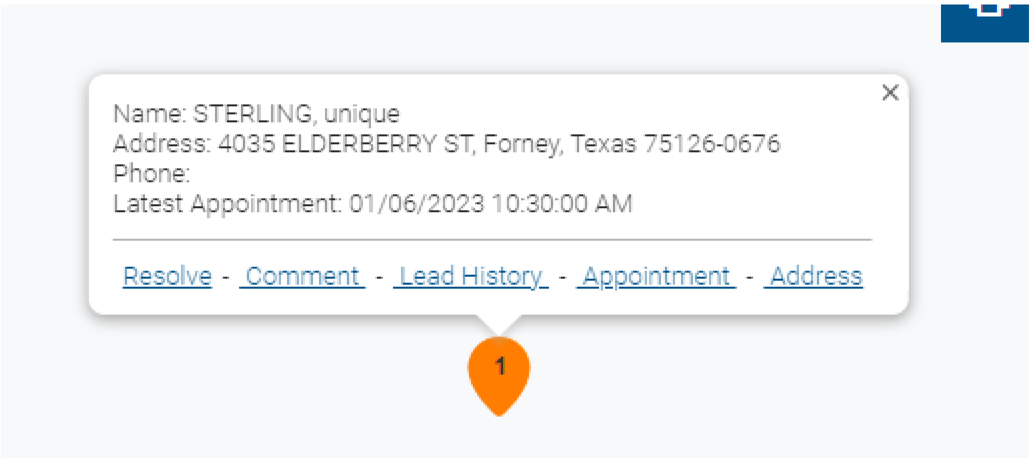
		SNo	Name	Address	Assign Date	Zip/Postal Code	Type	C	F	P	G
		1	STERLING, Unique	4035 ELDERBERRY ST	10/6/2022	75126-0676	Response Card				
Schedule Virtual Appointment On Jan 06 2023 10:30 AM											
		2	BROOKS, NATHANIEL	1244 OAK PARK DR	5/13/2022	75232-1180	Response Card				
Schedule Virtual Appointment On Jan 07 2023 10:30 AM											

The inbox lead number will be indicated on the pin on the map.



To return to the lead box, click  .

A green pin will indicate there is a current appointment for the lead,
an orange pin will indicate there is a past
due appointment for a lead,
a red pin will indicate there is no appointment for the lead



Options Available for a Lead on a Map

This option allows you to interact with the lead from the map.

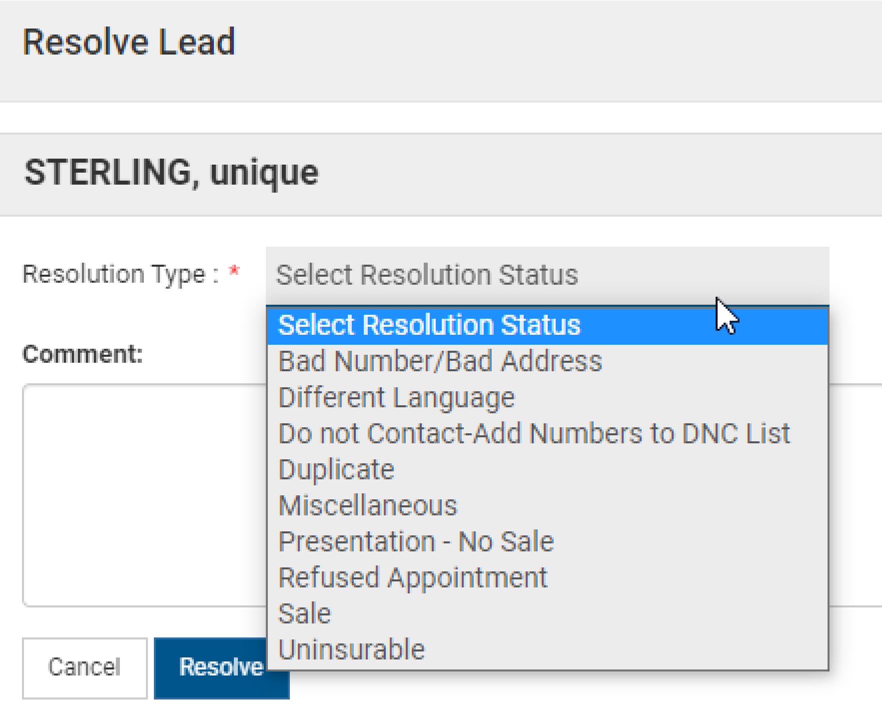
From the map, you will have the following options available: Resolve, Comment, Lead History, Appointment and Address.

Select the appropriate pin on the map, click the pin, and select the appropriate action.

Resolve a Lead

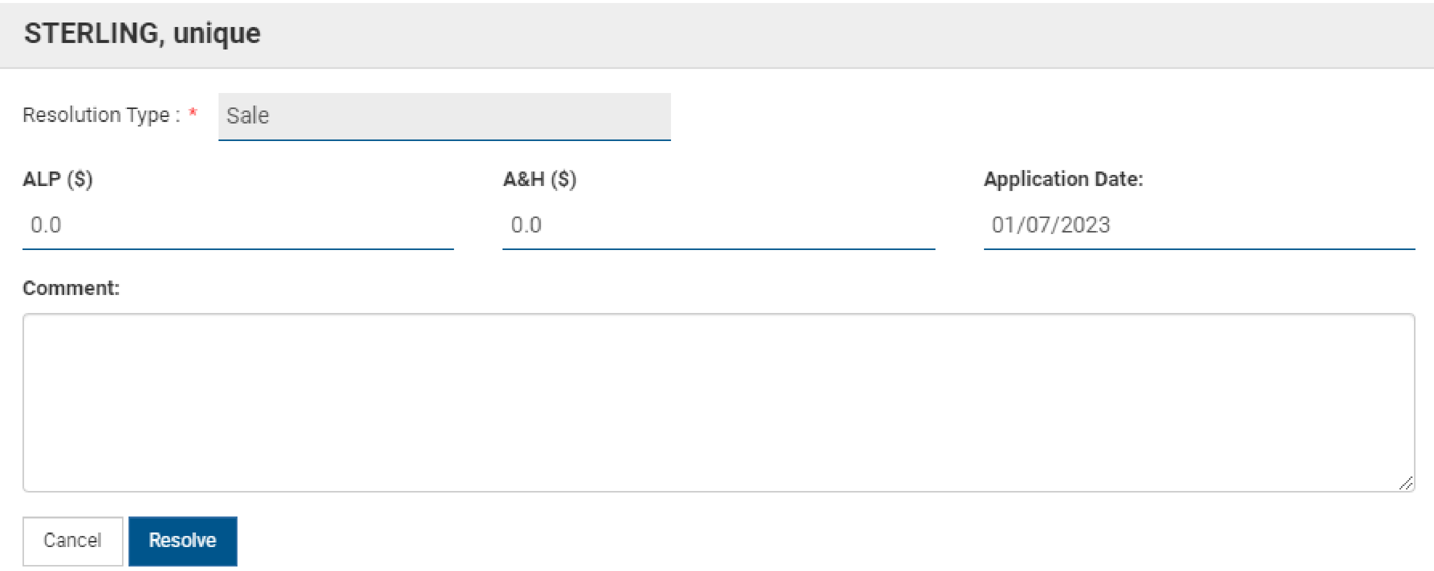
This option allows you to resolve a lead from your lead inbox.

Select the appropriate lead, click resolve lead, select the reason from the resolution type drop-down, enter any comments you have about the lead, and click Resolve.

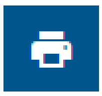


Enter Production from a Resolved Sale

This option allows you to resolve the lead as a sale and enter your ALP and A&H production numbers for the sale. Select the appropriate lead, click resolve lead, select Sale from the resolution type drop-down, enter your production numbers and click Resolve.



Print Lead Details on a Map

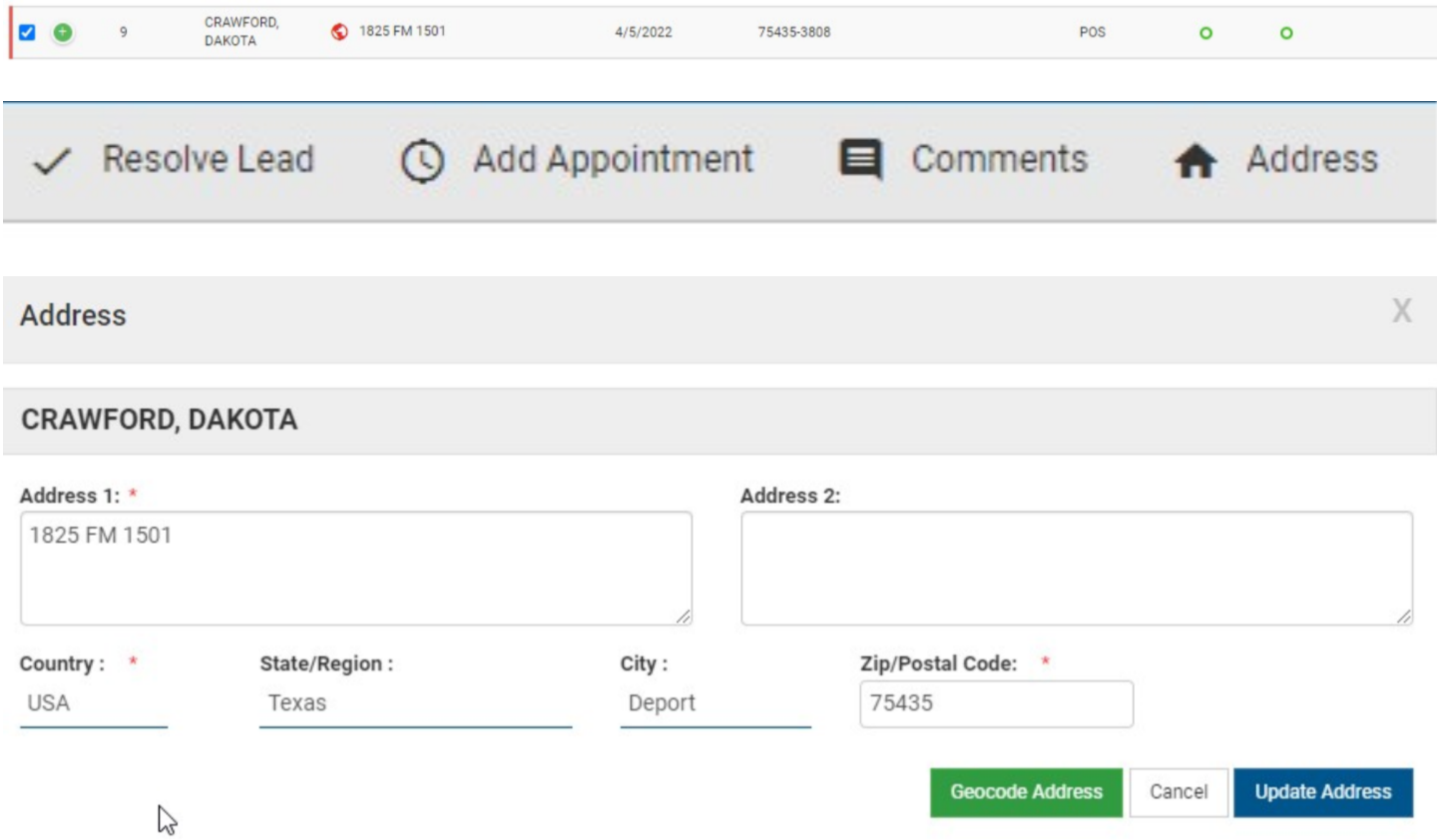


This option allows you to generate a printer-friendly map of your leads and appointment information.

Update/Geocode Address

This option allows you to update the address of the selected lead and geocode if the automatic process did not provide a quality geocode.

Select the appropriate lead, click address, make updates to the address, click the geocode, select the geocoded address radio button, and click Update Address. From lead details, you will notice your selected lead now has an updated address and includes a green geocode icon  to indicate the geocode was successful.

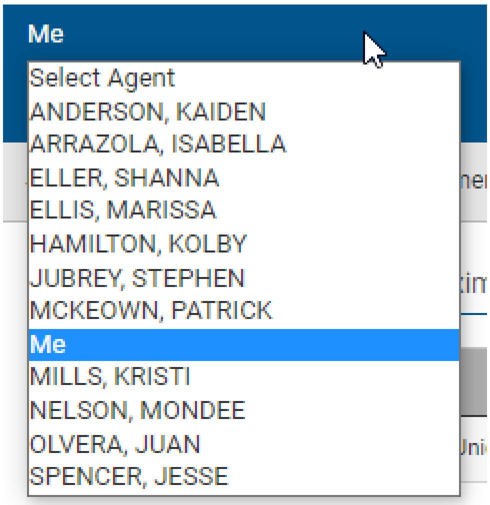


4.2.1. Lead In Box Filters

View Leads by Agent

This option allows you to select another agent's lead to view. Managers can see their own leads, as well as leads assigned to the other associates in their hierarchy.

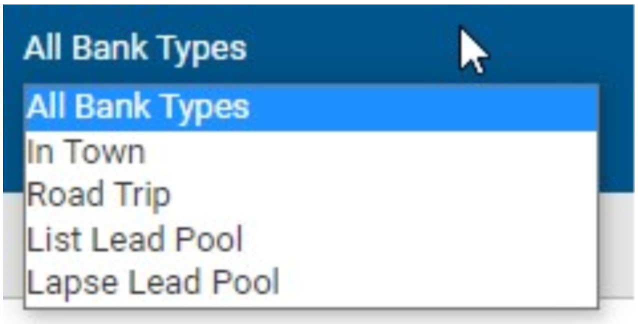
From the lead inbox, select the appropriate agent from the Select Agent drop-down. To return to your lead inbox, select Me.



View Leads by Lead Bank Type

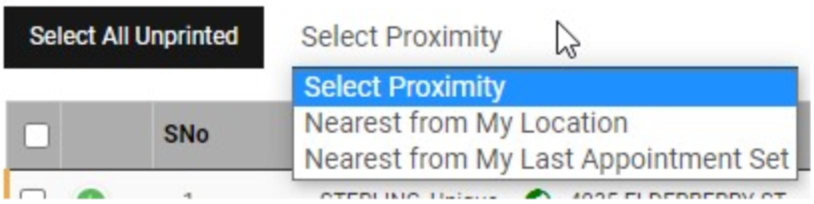
This option allows you to filter your leads by bank type. The default value is In town.

From the lead inbox, select the bank type you would like to view from the drop-down.



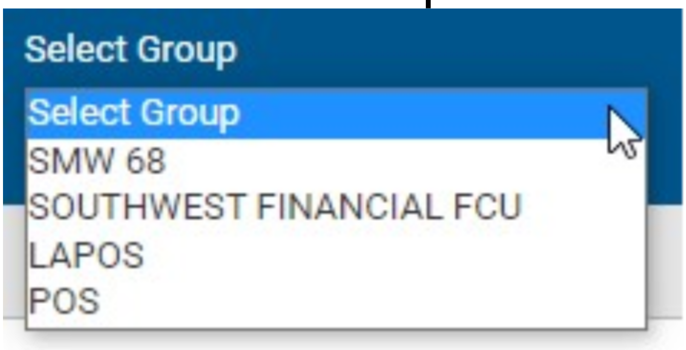
View Leads by Last Activity

This option allows you to filter your leads by the last activity selected when you tracked the lead after each phone call or interaction with the lead from Impact Mobile. In Impact, you can filter by the latest activity logged for that lead.
From the lead inbox, select the last activity you would like to view from the drop-down.



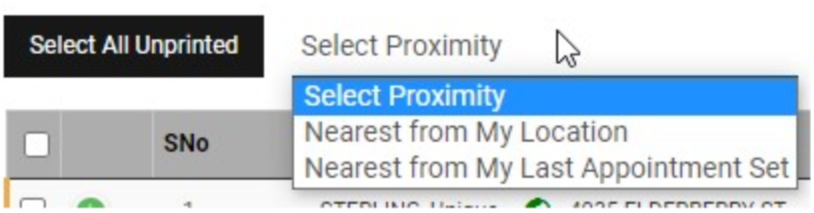
View Leads by Group

This option allows you to filter your leads by group, union, or association.
From the lead inbox, select the group you would like to view from the drop-down.



Filter by Proximity

This option allows you to filter your lead inbox by proximity.
From the lead inbox, select the appropriate proximity from the drop-down to filter your lead inbox



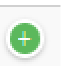
Number of Leads per Page

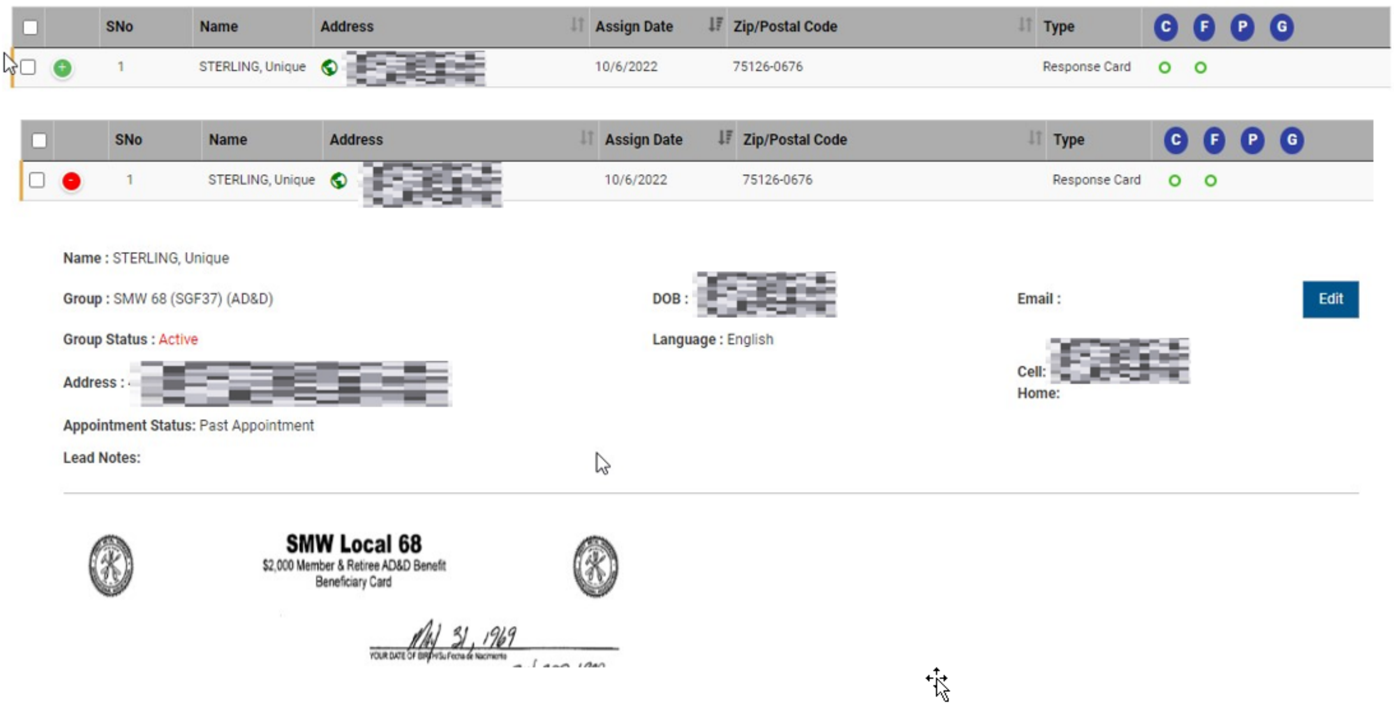
This option allows you to set the number of leads per page to view.
From the lead inbox, select the number of leads you would like to view per page from the Show drop-down.

4.2.2. Lead Inbox view lead details

View Lead Details

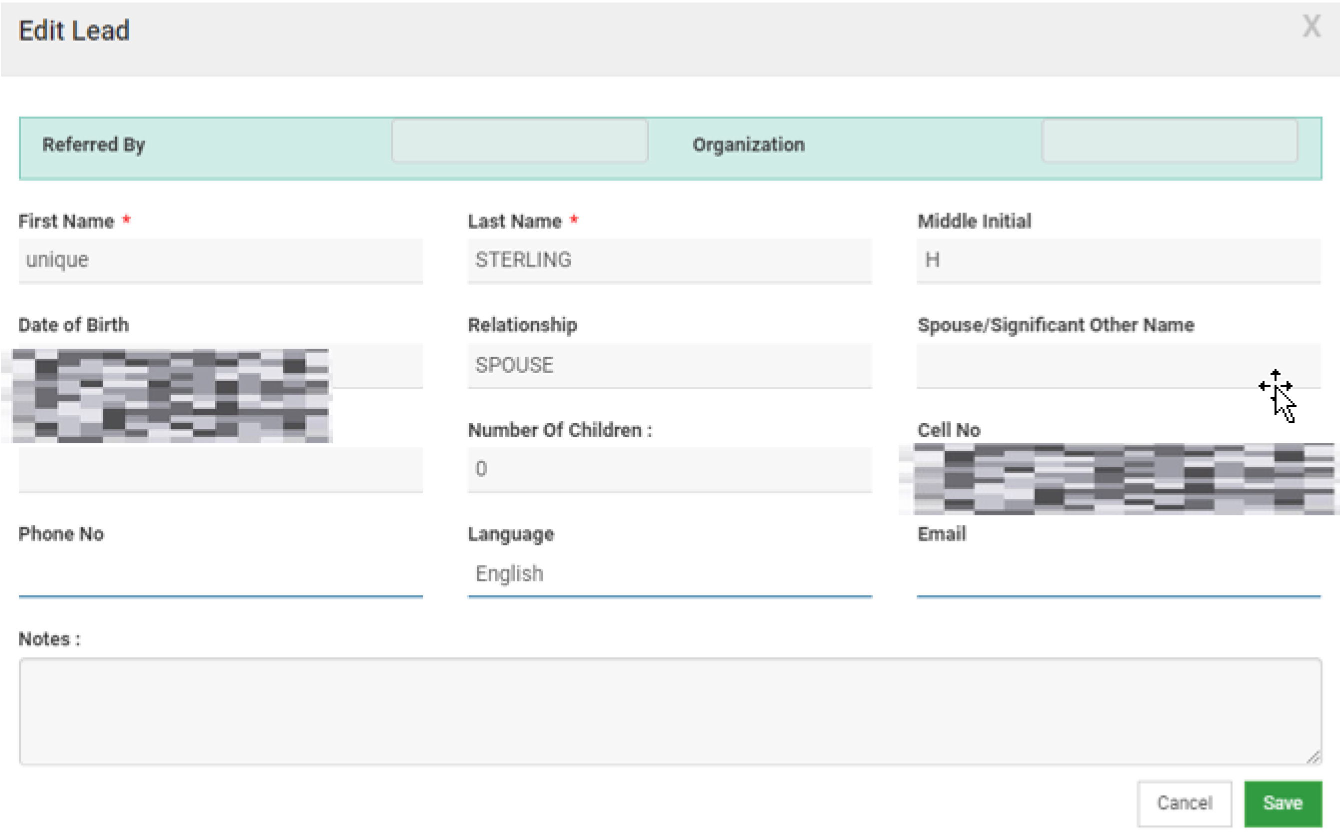
This option allows you to view details for lead and the lead image.
From the lead inbox, select the appropriate lead and click

 to expand.



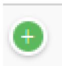
Edit Lead Information

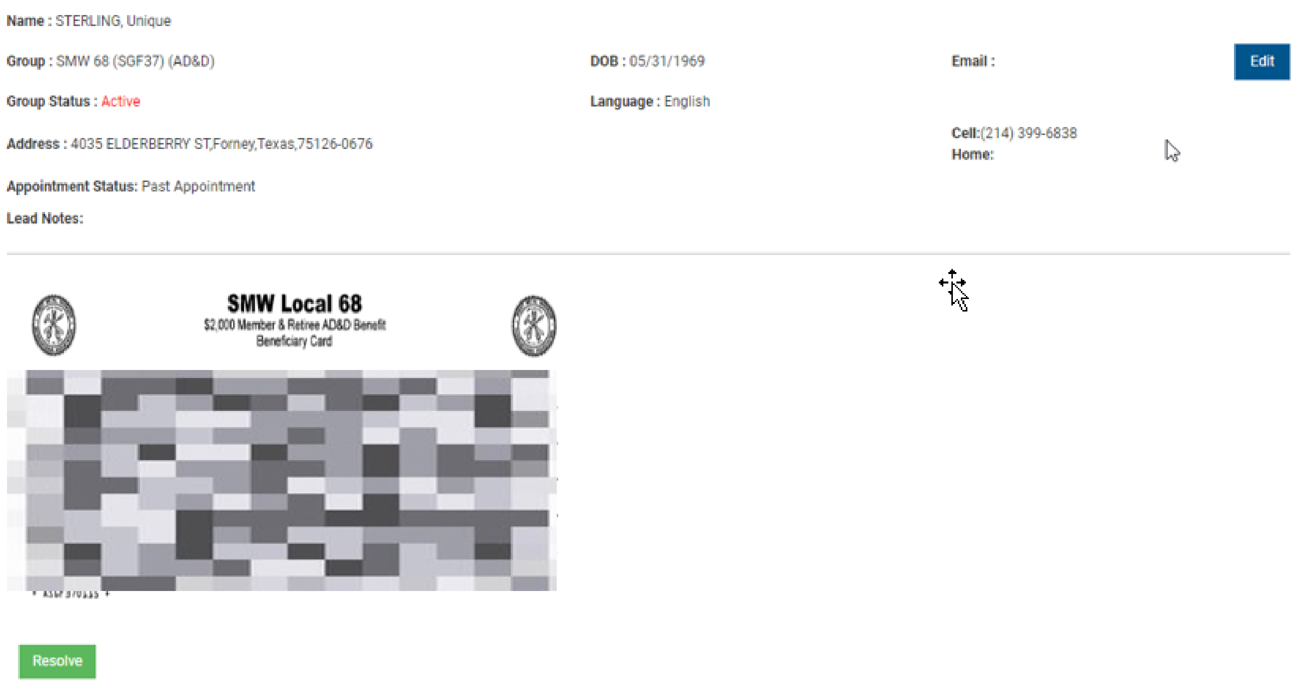
This option allows you to update lead information from the lead details view.
From the lead inbox, select the appropriate lead, click to expand, click Edit, make the appropriate changes, and click Save Changes.

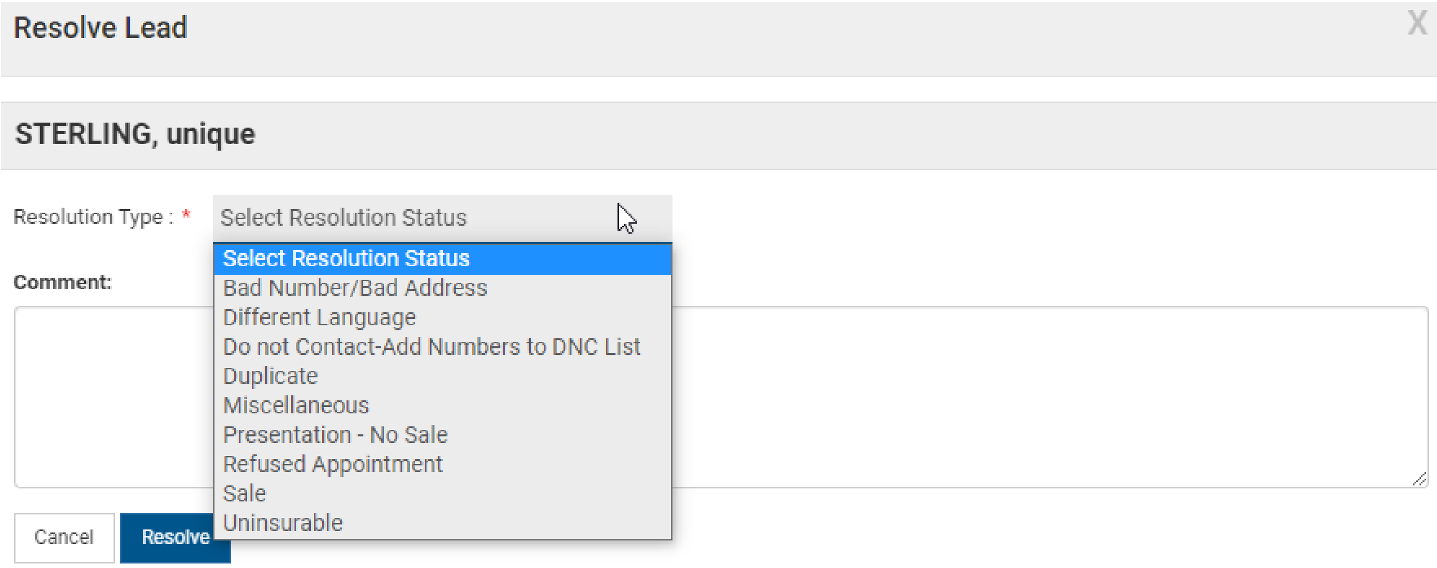


Resolve a Lead from Lead Details

This option allows you to resolve the lead from the lead details view.

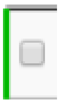
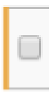
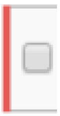
From the lead inbox, select the appropriate lead, click  to expand, click Resolve, select the reason from the resolution type drop-down, enter any comments you have about the lead, and click Resolve





Status of Lead Appointment

This option allows you to view the status of a lead appointment at a glance.

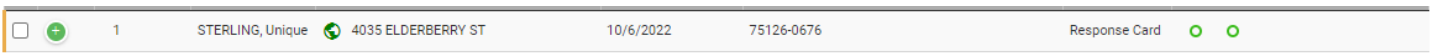
From the lead inbox, green  will indicate there is a current appointment for the lead, orange  will indicate there is a past due appointment for a lead, red  will indicate there is no appointment for the lead. These status indicators will also be represented when viewing leads on a map.

4.2.3. Print Certs, Freshen Ups, POS Info and Gift Certs

Print ADD Certs, Freshen Ups, POS Info, and Gift Certs

You can print Accidental Death and Dismemberment Certificates, Freshen-Up Letters, POS information sheets, and Group Information Sheets using these buttons. Unlike Impact Mobile, you can print multiple certificates at the same time by selecting multiple leads.

To print individual documents, the user would select the green bubble in the same row as the lead.



Generate a Certificate

This option allows you to generate a certificate for selected leads.
From the lead inbox, select the appropriate leads, locate the C column, if there is a , a certificate is available. Click to bring up the certificate in a new tab in your browser to view and download. If there is a ., a certificate has already been generated.

Generate a Freshen-Up Letter

This option allows you to generate a freshen-up letter for selected leads.
From the lead inbox, select the appropriate leads, locate the F column, if there is a , a freshen-up letter is available.

Click to bring up the freshen-up letter in a new tab in your browser to view and download. If there is a . , a freshenup letter has already been generated.

Generate a POS Summary

This option allows you to generate a POS summary for POS type leads.

From the lead inbox, select the appropriate leads, locate the P column, if there is a , a POS summary is available.

Click

to bring up the POS summary in a new tab in your browser to view and download. If there is a . , a POS summary has already been generated.

Generate a Pre-Approach Letter

This option allows you to generate a pre-approach letter for the selected lead.

From the lead inbox, select the appropriate leads, locate the A column, if there is a , a pre-approach letter is available.

Click to bring up the pre-approach letter in a new tab in your browser to view the letter and download. If there is a . ,

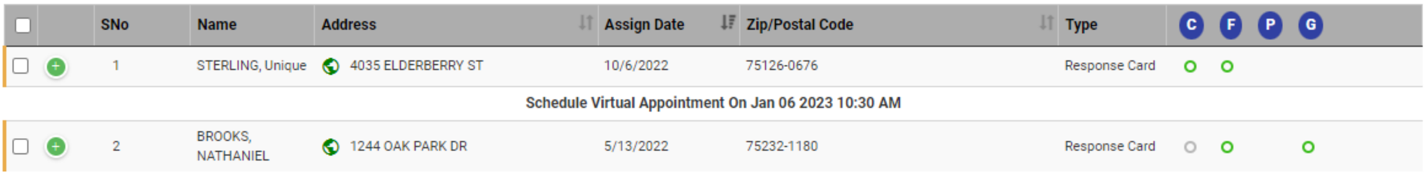
a pre-approach letter has already been generated.

Bulk Print Lead Letters

This option allows you to select all leads that letters have not been printed yet.

From the lead inbox, click Select All Unprinted or the desired leads and click C , F , P or A or to generate the

lead file
for download.



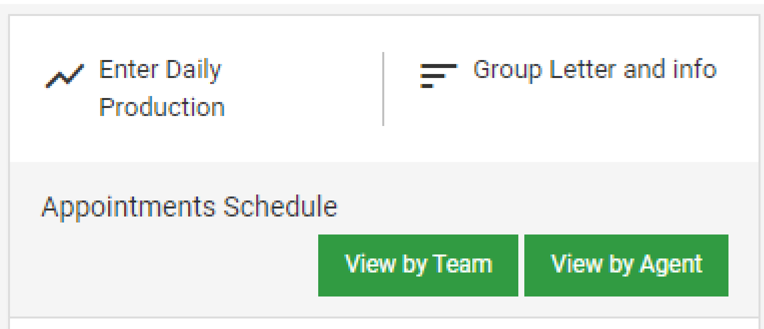
		SNo	Name	Address	Assign Date	Zip/Postal Code	Type	C	F	P	G
		1	STERLING, Unique	4035 ELDERBERRY ST	10/6/2022	75126-0676	Response Card				
Schedule Virtual Appointment On Jan 06 2023 10:30 AM											
		2	BROOKS, NATHANIEL	1244 OAK PARK DR	5/13/2022	75232-1180	Response Card				

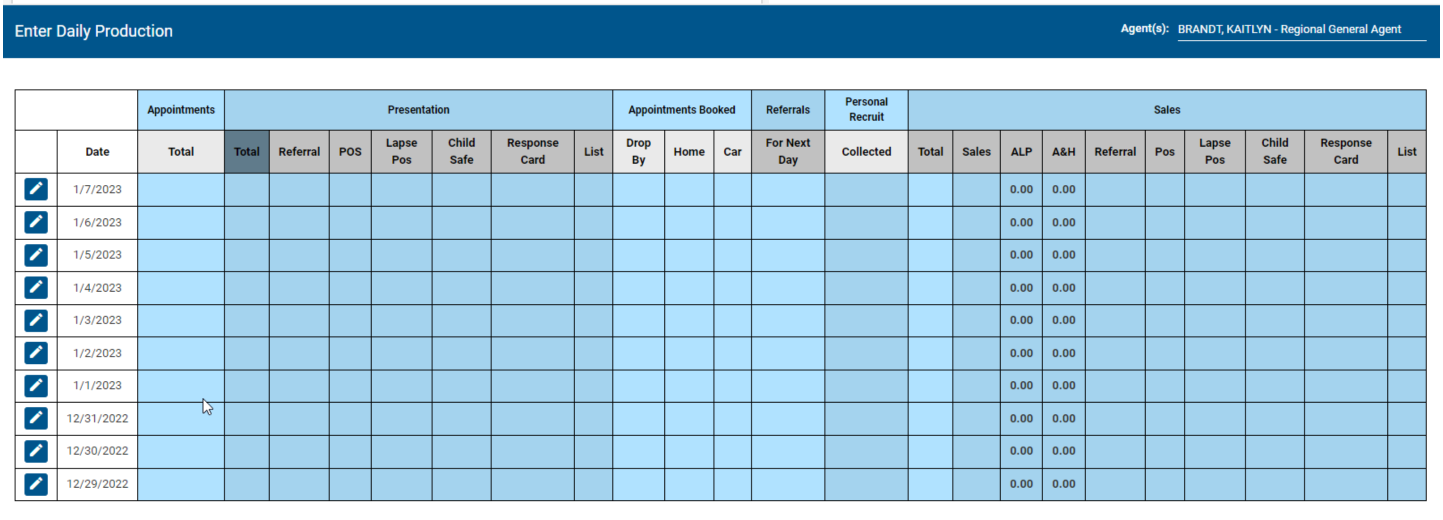
4.2.4. Access Daily Production

Access Daily Production from Lead Inbox

This option allows you to update your reported production and activity numbers that are displayed on production reporting.

From the lead inbox, click to proceed to Enter Daily Production.





Enter Daily Production   Agent(s): BRANDT, KAITLYN - Regional General Agent

		Appointments	Presentation							Appointments Booked			Referrals	Personal Recruit	Sales									
	Date	Total	Total	Referral	POS	Lapse Pos	Child Safe	Response Card	List	Drop By	Home	Car	For Next Day	Collected	Total	Sales	ALP	A&H	Referral	Pos	Lapse Pos	Child Safe	Response Card	List
	1/7/2023																0.00	0.00						
	1/6/2023																0.00	0.00						
	1/5/2023																0.00	0.00						
	1/4/2023																0.00	0.00						
	1/3/2023																0.00	0.00						
	1/2/2023																0.00	0.00						
	1/1/2023																0.00	0.00						
	12/31/2022																0.00	0.00						
	12/30/2022																0.00	0.00						
	12/29/2022																0.00	0.00						

• Appointments

o Start - Number of appointments at the beginning of your

day
o Finish - Number of appointments you ended the day with
• Presentation
o Total – Number of presentations you gave this day. This number should reflect the total number
of referral, POS, Response Card, Lapsed POS, List lead, and Child Safe presentations.
o Referral - Number of referral presentations
o POS - Number of POS presentations
o Child Safe - Number of Child Safe presentations
o Lapse POS - Number # of Lapsed POS presentations
o Response Card - Number of Response Card presentations
o List - Number of list lead presentations
• Appointments Booked
o Drop By - Number of drop by appointments booked
o Home - Number of appointments booked in the home
o Car - Number of appointments booked from the car
o Next Day Start - Number of appointments scheduled for the next day at the beginning of today
o Next Day Finish - Number of appointments scheduled for the next day at the end of today
o Next Day Referrals - Number of referrals collected today that have appointments scheduled for
the next day
• Referral
o Collected - Number of referrals collected this day
o Live - Number of referrals that are in your working area
• Live Lead
o Start - Number of live leads in the users lead account at the start of the day
o Finish - Number of live leads in the users lead account at the end of the day

• Personal Recruit
o Total - Number of personal recruits for the day
• Sales
o Sales - Number of sales made by the user. This number must reflect the total of referral, POS,
Child Safe, lapse POS, response card, and list lead sales.
o ALP - Amount of ALP production from the sales
o A&H – Amount of A&H production from the sales
o Referral - Number of referral sales
o POS - Number of POS sales
o Child Safe - Number of child safe sales
o Lapse POS - Number of lapsed POS sales
o Response Card - Number of response card sales
o List Lead - Number of list lead sales
• Comments
o Add a comment about the day (optional)

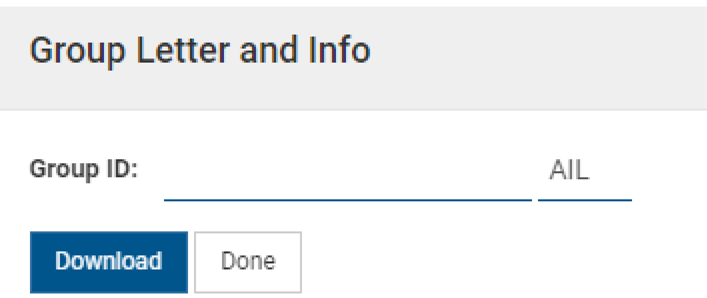
4.2.5. Access a Read Off Letter for a Group

Access a Read Off Letter for a Group

This option allows you to pull and view the group read off letter for the leads group.

From the lead inbox, click 

, enter the SG Number or Group Code, select the appropriate group, and click
Download to download the letter in a PDF format.

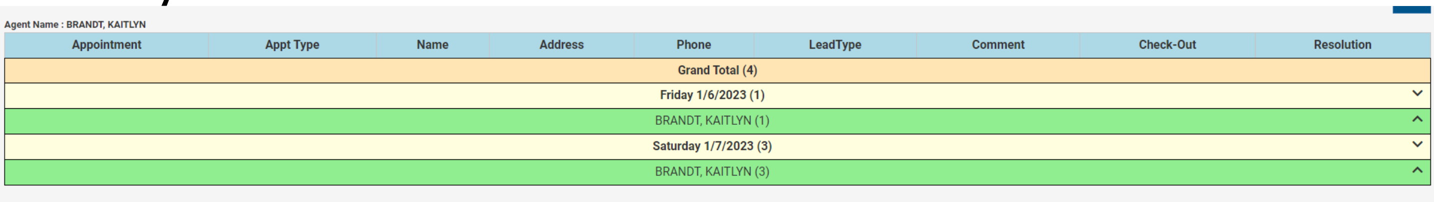


4.2.6. View and Print Schedules and Appointments

View your Weekly Schedule

This option allows you to view and print your weekly appointments scheduled. Appointments for the current day will be
shown at the bottom of the schedule. Days that appear in gray indicate there are appointments scheduled for that day. From the lead inbox, the weekly schedule will be on the right. Select the day you would like to see your appointments
scheduled.

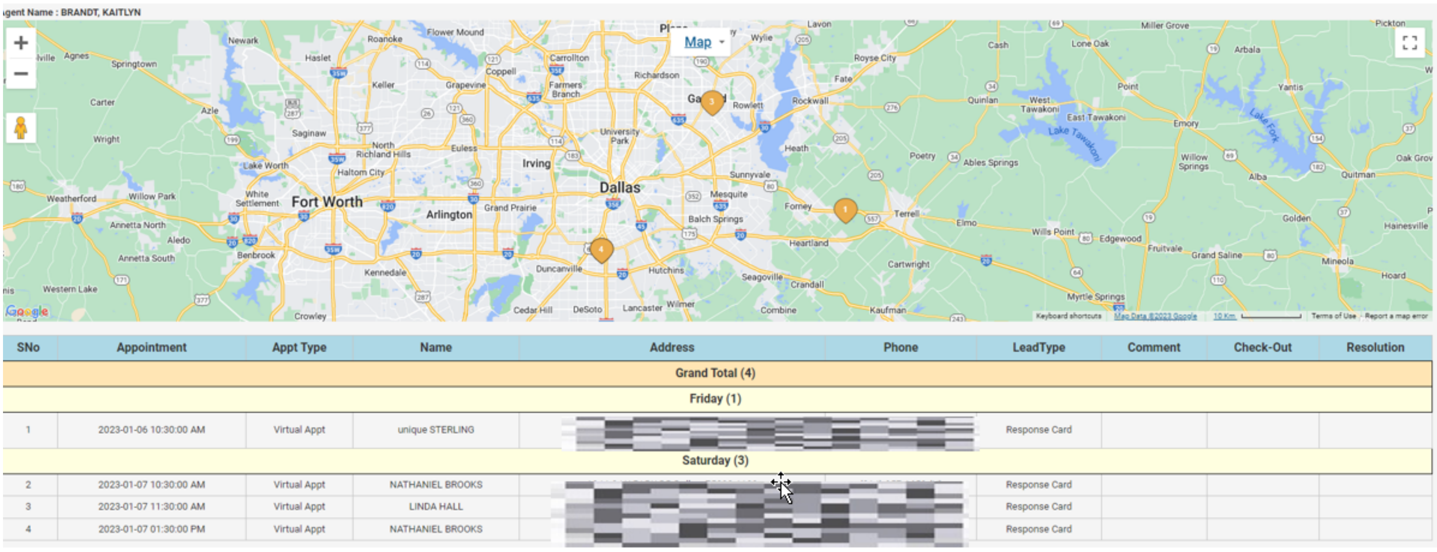
View by Team



Agent Name : BRANDT, KAITLYN

Appointment	Appt Type	Name	Address	Phone	LeadType	Comment	Check-Out	Resolution
Grand Total (4)								
Friday 1/6/2023 (1)								
BRANDT, KAITLYN (1)								
Saturday 1/7/2023 (3)								
BRANDT, KAITLYN (3)								

View by Agent



Agent Name : BRANDT, KAITLYN

SNo	Appointment	Appt Type	Name	Address	Phone	LeadType	Comment	Check-Out	Resolution
Grand Total (4)									
Friday (1)									
1	2023-01-06 10:30:00 AM	Virtual Appt	unique STERLING	[redacted]		Response Card			
Saturday (3)									
2	2023-01-07 10:30:00 AM	Virtual Appt	NATHANIEL BROOKS	[redacted]		Response Card			
3	2023-01-07 11:30:00 AM	Virtual Appt	LINDA HALL			Response Card			
4	2023-01-07 01:30:00 PM	Virtual Appt	NATHANIEL BROOKS			Response Card			

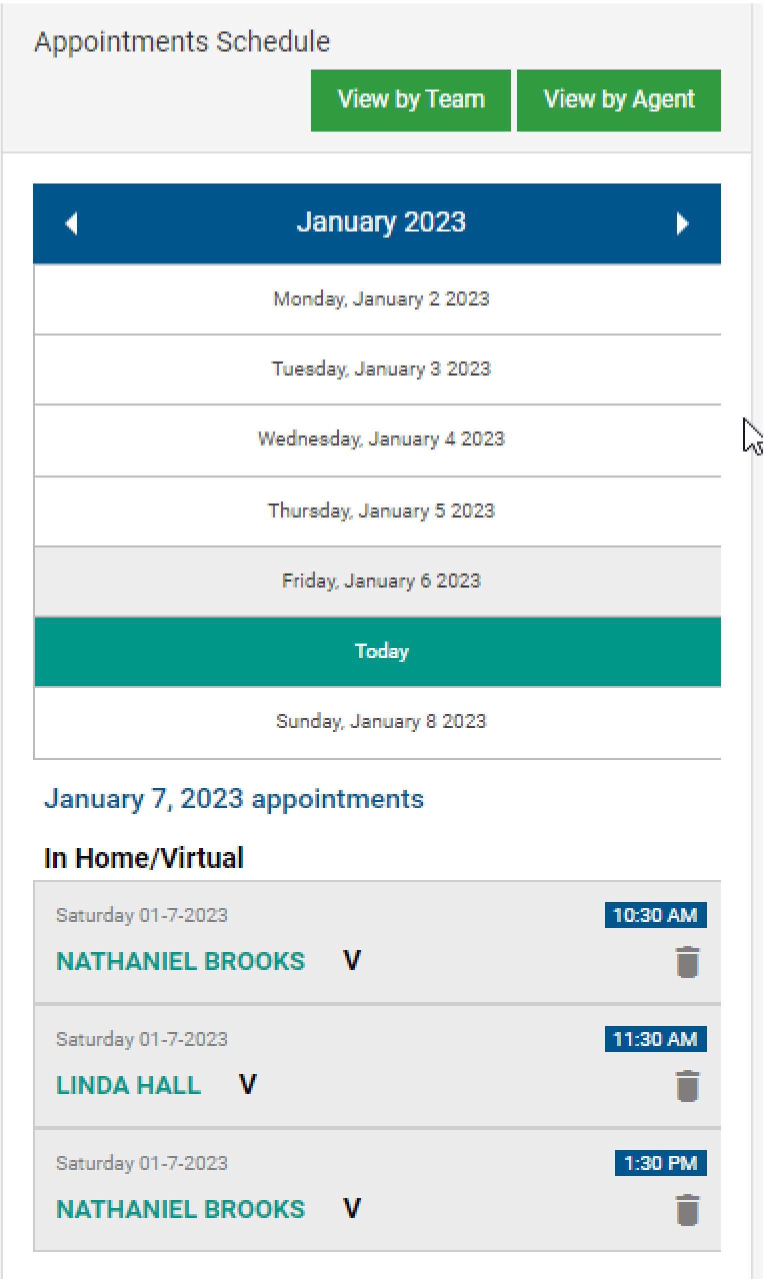
Remove Appointment from Schedule

This option allows you to remove an appointment from your

schedule.
From the appointment scheduled, locate the appointment you want to remove and click , trashcan.

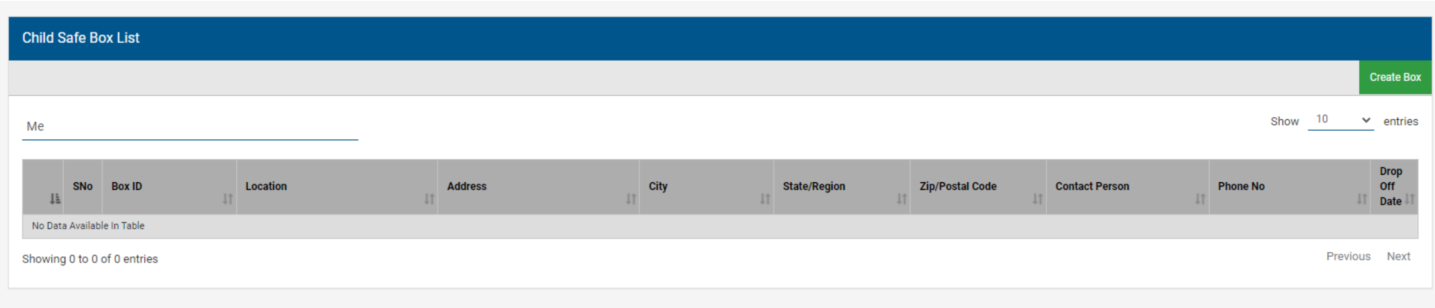
Print Appointments Scheduled for the Week

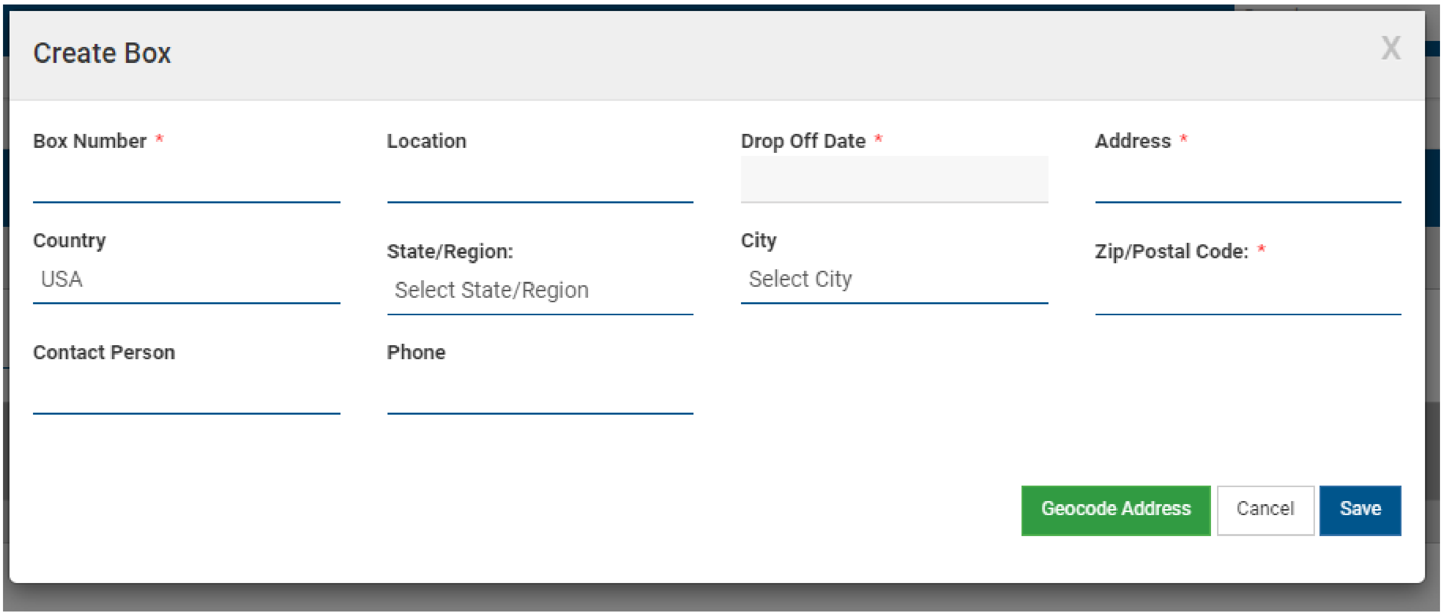
This option allows you to print all of your appointments scheduled for the week.
From appointments scheduled, click Print Schedule.



4.3. Child Safe

In this section you can create and track a location that you placed a cardboard child safe box at. Placing a child safe box is for the purpose of collecting leads.





View Child Safe Boxes by Agent

This option allows you to select another agent's child safe boxes to view. Managers can see their own child safe boxes, as well as child safe boxes for associates in their hierarchy.

1. From the child safe box list, select the appropriate agent from the drop-down.
2. T return to your own lead inbox select your name from the drop-down.

Create a Child Safe Box

This option allows you to add a child safe box location to place and track child safe boxes. The purpose of this option is
to generate leads.

1. Click Create Box
2. Complete the form.
3. Geocode the address.
4. Click Save.

Disable a Child Safe Box
This option allows you to disable a child safe box(s) and remove the box from your list.
1. Select the appropriate child safe box(s).
2. Click Disable and confirm.

Add a Pickup for a Child Safe Box
This option allows you to track how many leads are collected per child safe box.
1. Select the appropriate child safe box.
2. Click Add Pickup.
3. Select the Follow Up Day.
4. Enter the number of cards collected.

View the History of a Child Safe Box
This option allows you to see how many leads have been collected for each child safe box and when the last pickup was
performed.
1. Select the appropriate child safe box.
2. Click History.

Edit a Child Safe Box
This option allows you edit an existing child safe box.
1. Select the appropriate child safe box
2. Click Edit and update box information.

Viewing Child Safe Box(s) on a Map

This option allows you to view selected child safe box(s) on a map.

1. Select the appropriate child safe box(s).
2. Click Map.

Options Available for a Child Safe Box on a Map

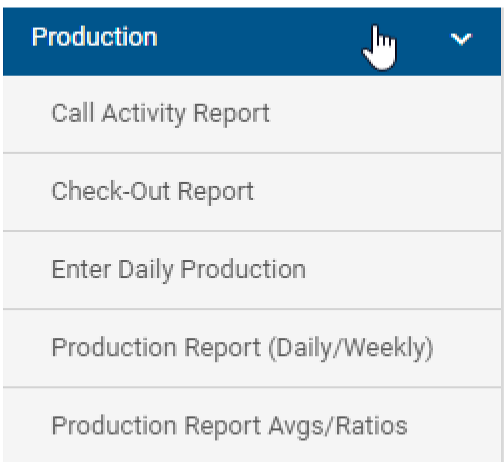
This option allows you to interact with the child safe box from the map.
From the map you will have the following options available: Disable, Edit, Add Pickup and History

Print Child Safe Box Details on a Map

This option allows you to print the child safe box details that are presented on a map. The print will include the following
information: box ID, location, address, city, state, zip, contact person, phone and drop-off date.
From the map, click , print.

4.4. Production.

Reports



Call Activity Report: This report will show you the

Daily/Weekly/Monthly results of yours or your assigned agents efforts during a Phone session. It is recommended for every hour of call activity, an agent should average a minimum of 30 calls. Your Weekly calls should be between 500 and 1000 calls per week. Calls to Contact should average around 20. Calls to Appt should average around 35. Contact to Appt % should average 50%. These are based on Company Averages. To improve these areas please contact your Manager for tips and training. This tool can be viewed hourly to ensure yours or your agents are on pace to being productive during a daily phone session.

Name	Total Calls	Contacts	In-Home Appointments	Virtual Appointments	Calls to Contact	Calls to Appt	Contact to Appt %

<u>Check-Out Report:</u> This report will show you the Daily/Weekly/Monthly results of yours or your assigned agents check out results. This includes Pres-Sales, Pres-No-Sales, Resets, No-Shows, Drop Bys and Refused Appointments. This is separated by In-Home and Virtual.

In-Home Virtual

Name	Check-Out	Pres–Sales	Pres–No-Sales	Resets	No-Show	Drop Bys	Refused

View Daily Production Report Avg/Ratios

This report will show you the Weekly results for Show Ratio, Referrals per preso, ALP and A&H per sale, and closing ratio and closing ratio per lead type. This report is heavily dependent on accurate reporting when a lead is checked out.

The Production Report with Avg Ratios is a statistical view of the Production Weekly Report. You will have the ability to view all of the agents in your hierarchy. All user levels will have access to this option.

The values are determined by the following calculations:
Total Show % Presentation Total/Appointments Total
From the Field (Drop By + Home + Car)/Appointments Total
Avg Ref Per Pres Referrals Collected/Presentation Total
Close Ratio % Sales Total/ Presentation Total
Avg ALP/Sale ALP/Sales
Avg A&H/Sale A&H/Sales
Referral Close% Sales Referral/Presentation Referrals
POS Close% Sales POS/Presentation POS
Child Safe Close% Sales Child Safe/Presentation Child Safe
Response Card Close% Sales Response Card/Presentation Response Card
Avg ALP/Sale ALP/Sales

Export to Excel

This option allows you to export the production report avg/ratios to an excel file.
Click Export to excel to generate the file and open in Excel.

	Presentation	Appointments Booked	Referral	Sales							
Name	Total Show %	FromtheField	AvgRefPerPres	CloseRatio	Avg ALP/Sale	Avg A&H/Sale	Referral Close%	POS Close%	LPOS Close%	Child Safe Close%	Response Card Close%
JUBREY STEPHEN J (SGA-RGA-MGA) **(SGA)**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
KAITLYN BRANDT **(RGA)**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Production Report (Daily/Weekly): This report will display your weekly and daily appt, preso, referral and sales results for you and your assigned team.

The Production Report (Daily/Weekly) allows you to view production results for the SGA office for the week. You will have the ability to view all of the agents in your hierarchy. All user levels will have access to this option.

View Daily Production Report

The Daily Production Report allows you to view production results for the SGA office for a specific day. You will have the

ability to view all of the agents in your hierarchy.

1. Select Production Report (Daily/Weekly) from the Production menu
2. Select the daily for the Report Type and select the appropriate day.
3. Notice the week staring day, this is set from Impact Manage.

View Weekly Production Report

The Weekly Production Reports allows you to view production results for the SGA office for the week. You will have the

ability to view all of the agents in your hierarchy.

1. Select Production Report (Daily/Weekly) from the Production menu.
2. Select the weekly for the Report Type and select the appropriate day.
3. Notice the week staring day, this is set from Impact Manage.

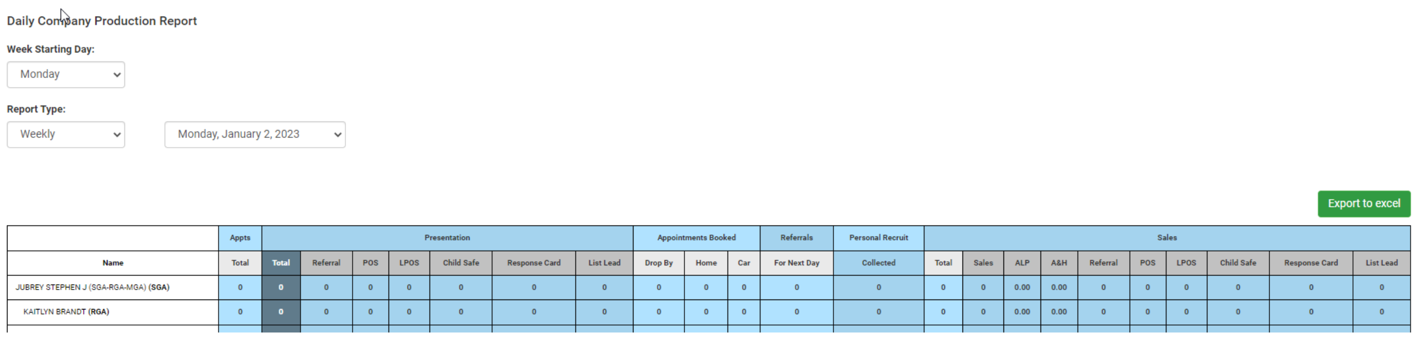
Export to Excel

This option allows you to export the daily/weekly production report to an excel file.

Click Export to excel to generate the file and open in Excel.

Week Starting Day

The week starting day is set from Impact Manage.
1. Login to Impact Manage.
2. Select the day of the week for the starting day and click save.


Daily Company Production Report

Week Starting Day:

Monday

Report Type:

Weekly

Monday, January 2, 2023

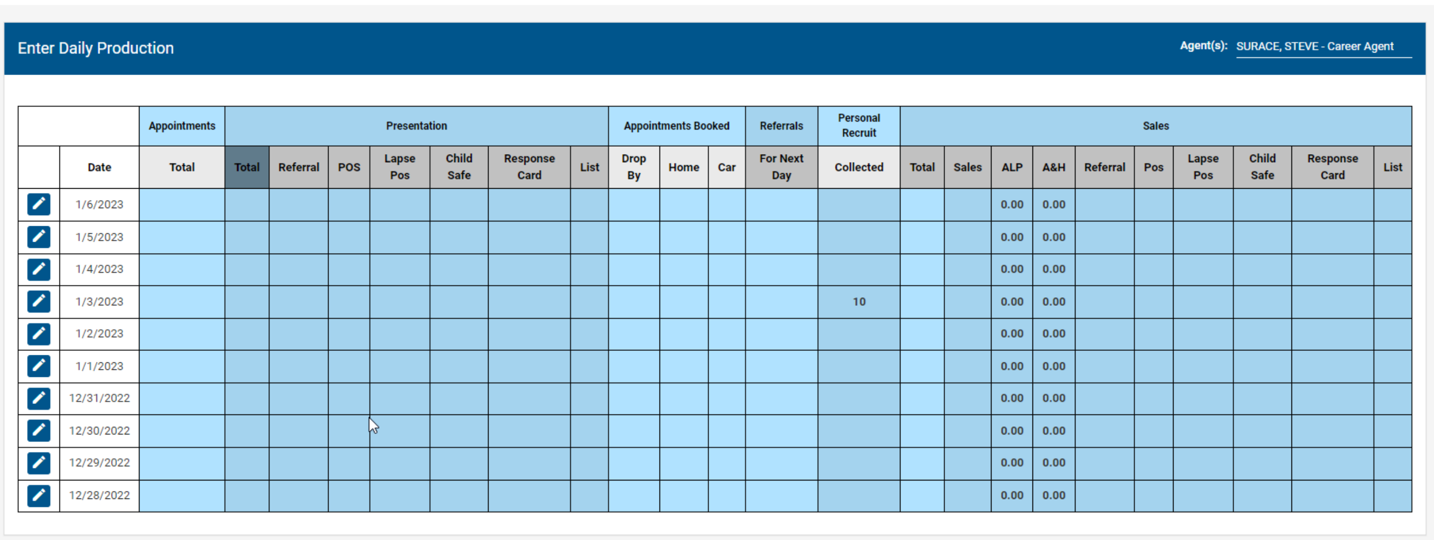
Export to excel

	Appts	Presentation							Appointments Booked			Referrals	Personal Recruit	Sales									
Name	Total	Total	Referral	POS	LPOS	Child Safe	Response Card	List Lead	Drop By	Home	Car	For Next Day	Collected	Total	Sales	ALP	A&H	Referral	POS	LPOS	Child Safe	Response Card	List Lead
JUBREY STEPHEN J (SGA-RGA-MGA) **(SGA)**	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0.00	0	0	0	0	0	0
KAITLYN BRANDT **(RGA)**	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0.00	0	0	0	0	0	0

4.4.1. Enter Today's Production

In this section you can edit todays production and previous days data. Some items are automatically imported from your actions in Impact. Some items must be manually updated. If you are in management your can view and edit your teams data.

This information will be fed into the weekly and daily production report, in the report sections.


Enter Daily Production

Agent(s): SURACE, STEVE - Career Agent

		Appointments	Presentation							Appointments Booked			Referrals	Personal Recruit	Sales									
	Date	Total	Total	Referral	POS	Lapse Pos	Child Safe	Response Card	List	Drop By	Home	Car	For Next Day	Collected	Total	Sales	ALP	A&H	Referral	Pos	Lapse Pos	Child Safe	Response Card	List
	1/6/2023																0.00	0.00						
	1/5/2023																0.00	0.00						
	1/4/2023																0.00	0.00						
	1/3/2023													10			0.00	0.00						
	1/2/2023																0.00	0.00						
	1/1/2023																0.00	0.00						
	12/31/2022																0.00	0.00						
	12/30/2022																0.00	0.00						
	12/29/2022																0.00	0.00						
	12/28/2022																0.00	0.00						

Enter Daily Production

This option allows you to enter your daily production. Auto-reported numbers based on resolutions from the Mobile will
be shown in your Daily Production. All user levels will have access to this option.

1. Select Daily Production from the Production menu.
2. Locate the day you would like to enter production for, click the pencil, enter your numbers and click save.

• Appointments
o Total - Number of appointments for the day
• Presentation
o Total – Number of presentations you gave this day. This number should reflect the total number
of referral, POS, Response Card, List lead, and Child Safe presentations.
o Referral - Number of referral presentations
o POS - Number of POS presentations
o Child Safe - Number of Child Safe presentations
o Response Card - Number of Response Card presentations
o List - Number of list lead presentations
• Appointments Booked
o Drop By - Number of drop by appointments booked
o Home - Number of appointments booked in the home
o Car - Number of appointments booked from the car
o Next Day - Number of appointments scheduled for the next day
• Referral
o Collected - Number of referrals collected this day
• Personal Recruit
o Total - Number of personal recruits for the day
• Sales
o Sales - Number of sales made by the user. This number

must reflect the total of referral, POS,
Child Safe, response card, and list lead sales.
o ALP - Amount of ALP production from the sales
o A&H – Amount of A&H production from the sales
o Referral - Number of referral sales
o POS - Number of POS sales
o Child Safe - Number of child safe sales
o Response Card - Number of response card sales
o List Lead - Number of list lead sales

Update Daily Production

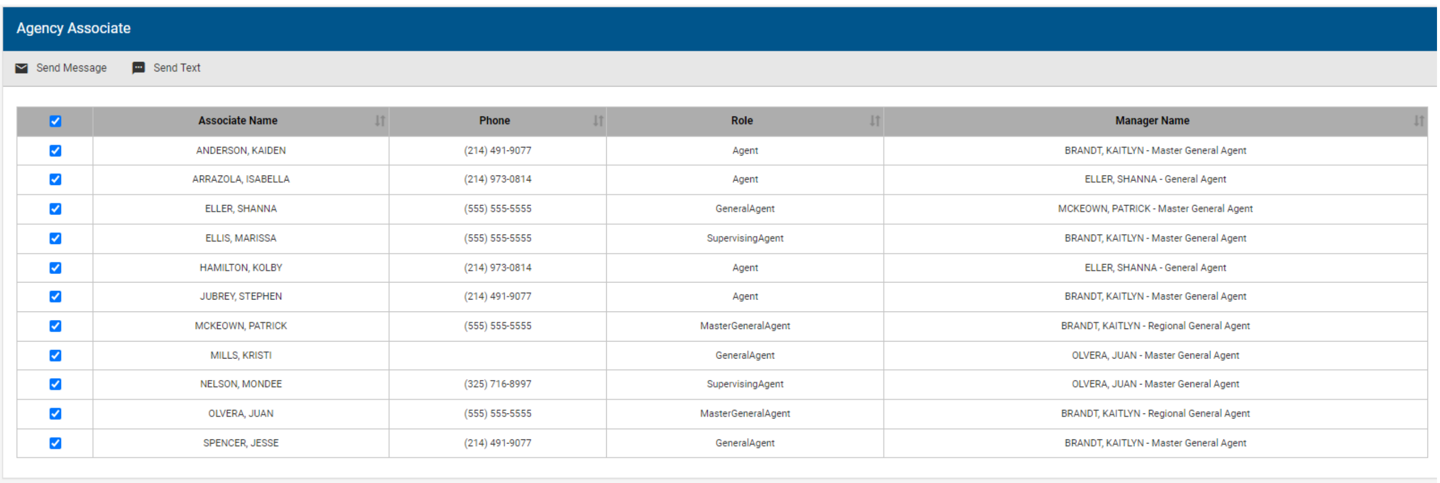
This option allows you to update previously entered daily production numbers. Auto-reported numbers based on resolutions from the Mobile will be shown in your Daily Production.

1. Select Daily Production from the Production menu.
2. Locate the day you would like to enter production for, click the pencil, enter your numbers and click save.

4.5. Agency

Agency Associates

This option is available for managers to view their hierarchy and the ability to send no-reply email and text (SMS) messages.



Agency Associate

Send Message   Send Text

☑	Associate Name	Phone	Role	Manager Name
☑	ANDERSON, KAIDEN	(214) 491-9077	Agent	BRANDT, KAITLYN - Master General Agent
☑	ARRAZOLA, ISABELLA	(214) 973-0814	Agent	ELLER, SHANNA - General Agent
☑	ELLER, SHANNA	(555) 555-5555	GeneralAgent	MCKEOWN, PATRICK - Master General Agent
☑	ELLIS, MARISSA	(555) 555-5555	SupervisingAgent	BRANDT, KAITLYN - Master General Agent
☑	HAMILTON, KOLBY	(214) 973-0814	Agent	ELLER, SHANNA - General Agent
☑	JUBREY, STEPHEN	(214) 491-9077	Agent	BRANDT, KAITLYN - Master General Agent
☑	MCKEOWN, PATRICK	(555) 555-5555	MasterGeneralAgent	BRANDT, KAITLYN - Regional General Agent
☑	MILLS, KRISTI		GeneralAgent	OLVERA, JUAN - Master General Agent
☑	NELSON, MONDEE	(325) 716-8997	SupervisingAgent	OLVERA, JUAN - Master General Agent
☑	OLVERA, JUAN	(555) 555-5555	MasterGeneralAgent	BRANDT, KAITLYN - Regional General Agent
☑	SPENCER, JESSE	(214) 491-9077	GeneralAgent	BRANDT, KAITLYN - Master General Agent

Send Email to Agent
This option allows you to send no-reply emails to Agents in your hierarchy.
1. Select Agency from the main menu.
2. Select the appropriate Agent(s).
3. Click Send Message.
4. Enter the subject and message text.
5. Click Send Email.

Send Email to Entire Hierarchy
This option allows you to send a no-reply email to all of the Agents in your hierarchy at once.
1. Select Agency from the main menu.
2. In the first column of the table select the checkbox to select the entire hierarchy.
3. Click Send Message.
4. Enter the subject and message text and click Send Email.

Send Text (SMS) to Agent
This option allows you to send no-reply text (SMS) message to Agents in your hierarchy.
1. Select Agency from the main menu
2. Select the appropriate Agent(s).
3. Click Send Message.
4. Enter the subject and message text and click Send Email.

Send Text (SMS) to Entire Hierarchy
This option allows you to send a no-reply text (SMS) message to all of the Agents in your hierarchy at once.
1. Select Agency from the main menu
2. In the first column of the table select the checkbox to select the entire hierarchy.
3. Click Send Message.
4. Enter the subject and message text and click Send Email.

4.6. Help Desk

Help Desk

Name	Title	Office	International Office	Email	Support Hours
			IMPACT HELP DESK		
Impact Help Desk	Impact Help Desk	(888) 804-9823	+1(888) 804-9823	ImpactHelp@ailife.com	Monday - Friday 7:00 am - 9:00pm CST Saturday 8:00 am - 4:30pm CST Sunday No Coverage

5. Agent Work Space (AWS)

6. How to Use the Child Safe Mobile App

QR Activation Code for Agents
View and Download here

Powerpoint slide for clients to view to install and use the Child Safe Mobile App
View and Download here

Company Approved Script for The Child Safe Mobile App
View and Download here

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