

Application Overview

Top Navigation Menu

Following menu options are available under Top Navigation



[DASHBOARD](#) [CLIENT](#) [NEEDS ANALYSIS](#) [QUOTE COMPARE](#) [ILLUSTRATIONS ▾](#) [APPLICATION ▾](#) [CASE MANAGEMENT](#)



- Dashboard
- Client
- Quote Compare
- Illustration (with sub menu)
 - Term
 - Whole Life
 - Universal Life
 - Annuity
- Application (with sub menu)
 - Full
 - Final Expense
 - Annuity
- Case Management
- User Icon
 - Producer
 - Preference
 - Maintenance (Users with HO Admin role only)
 - Sign Out

For ease of navigation, the system also highlights which page currently user is accessing.



[DASHBOARD](#) [CLIENT](#) [NEEDS ANALYSIS](#) [QUOTE COMPARE](#) [ILLUSTRATIONS ▾](#) [APPLICATION ▾](#) [CASE MANAGEMENT](#)



SIVA PRASATH ▾

DASHBOARD

Dashboard

DASHBOARD

WELCOME TO OPUS ILLUSTRATION SYSTEM

We are very excited to present an efficient central online location for you to help your clients obtain the life insurance coverage they need. Through this website, you can obtain illustrations, quote comparisons, submit applications and take control of your own client database.

INFORMATION LINKS

Need assistance?
Contact the Producer Services Department by phone at #(416) 626-6230 or by email at support@illustrateinc.com

RECENT CASES

Description	Module	Name	Saved	Illustration Preview	Eapp Status
-------------	--------	------	-------	----------------------	-------------

Powered by OPUS | © 2021 illustrate inc

Dashboard has 2 sections.

Left Section

Displays a welcome message for the agent and useful links. The content of this section can be updated time to time by admin by accessing <root directory>\GermaniaPublish\OpusPlus\Views\MessageCenterMessages

Right section

shows **recent cases** of the respective advisor in a tabular format for easy access. The advisor has preference to decide on how many cases to display. We will discuss this in details under Producer>Preference Menu.


If the advisor wants to see the illustration, He can click on the save case name under description and can go to illustration screen to see the details.

Alternatively, the agent can click on the icon under preview button to retrieve the save illustration report without generating again. However just in case the saved case is really old, it's better to go to the illustration by clicking on the case name under description so that the latest date is calculated and quotes reflect accurate value.

Client



CLIENT

Title	First Name *	Initial
<input type="text"/>	<input type="text" value=" "/>	<input type="text"/>
Last Name *	Suffix	Gender *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth *		
<input type="text" value="MM/DD/YYYY"/> 		
Mobile Phone Number	Phone Number	Email *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address Line 1	Address Line 2	City
<input type="text" value="Enter a location"/>	<input type="text"/>	<input type="text"/>
State *	Zip Code	Fax Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Upon Clicking Client, the agent will land to “New client” screen. If the agent wants to search a client, he can click on Select Client button. All the client information stored here can be accessed from illustration module in order to avoid the same information again.

Needs Analysis



NEEDS ANALYSIS [STEP1](#) [STEP2](#) [STEP3](#) [STEP4](#)

Final Expenses * <input type="text" value="\$15,000"/>	Outstanding debts (other than your mortgage) <input type="text" value="\$0"/>
Outstanding mortgage * <input type="text" value="\$0"/>	
How many children require college funding? <input type="text" value="0"/>	

Lump Sum Needs at Death:	
Final expenses:	\$15,000
Outstanding debts:	\$0
Mortgage:	\$0
College funding:	\$0
Total lump sum needs:	\$0
Income Needs:	
Annual income to be provided:	\$0
Number of years to provide income:	\$0
Estimated inflation rate:	3%
After-tax net investment yield:	6%
Calculation & Results:	
Present value of income needs	\$0
Add lump sum needs:	+ \$0
	= \$0
Less current investment capital:	- \$0
Less existing life insurance:	- \$0
Less present value of spouse's income	- \$0
Your need for additional life insurance:	= \$0

Through step by step process, the advisor can arrive on the coverage amount.

Quote Compare

Quote Compare screens allows the agent to compare the applicable plans with respect to base premium (or face amount) for certain input criteria. The input parameters on the left hand side needed for quote compare are Age, Gender/Sex Risk Class and Face Amount. Once the agent enters these details all the applicable product appears on the right-hand summary section. Upon click on CALCULATE button the Premium/Face Amount appears.

Just for simplicity, the agent does not require to enter date of birth, just age is sufficient.

Clicking on each of the options will take the agent to illustration page with all the entered information on the left-hand side transferred, thus saving time and effort of not entering the same information in the illustration screen.

QUOTE COMPARE

Date of Birth MM/DD/YYYY	Age * []	State * Texas
Gender Male	Risk Class Preferred Plus Non-Nicotine	Solve Method Premium
Pay Mode Annual	Face Amount \$100,000	

Term	Face	Premium
No Coverage Available		
Whole Life	Face	Premium
No Coverage Available		

CALCULATE

Powered by OPUS | © 2021 Illustrate inc

Illustrations



TERM CLIENT COVERAGE RIDERS

New Case Calculate AAR Report eApp

SELECT CLIENT

CLIENT INFORMATION

First Name * Last Name * State of Issue *
Texas

Sex * Date of Birth * Age *
Male MM/DD/YYYY

Will the Proposed Insured be the Owner?
 Yes No

TERM SUMMARY VIEW GRID VIEW

Client
Male | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Level Term 10	\$100,000	
Total Monthly Premium		

SAVE

Powered by OPUS | © 2021 illustrate inc

The agent has an option to come to illustration directly by selecting a submenu (Term/Whole Life) from illustration menu or from quote compare by selecting a plan option. The agent also can directly land on that illustration page after login by setting preference.

The illustration section has a number of tabs on the left hand side to capture inputs and a number of "Action Buttons" on the right hand side result summary section to display the inputs and act on the information provided.

TERM CLIENT COVERAGE RIDERS

New Case Calculate AAR Report eApp

SELECT CLIENT

TERM SUMMARY VIEW GRID VIEW

Client tab

TERM **CLIENT** COVERAGE RIDERS

New Case Calculate AAR Report eApp

SELECT CLIENT

CLIENT INFORMATION

First Name * Deb
Last Name * Maji
State of Issue * Texas

Sex * Male
Date of Birth * 1/1/1989
Age * 32

Will the Proposed Insured be the Owner?
 Yes No

TERM SUMMARY VIEW **GRID VIEW**

Deb Maji
Male | 32 | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Level Term 10	\$100,000	
Total Monthly Premium		

SAVE

Powered by OPUS | © 2021 illustrate inc

Captures Client information. The agent can pre-populated pre-existing client by click on select client tab which will open a client search screen. Otherwise to generate illustration the agent must enters correct Gender, Age. Once Gender and Age information is entered rest of the illustration input tabs (Basic Info, Coverage, Riders) as shown above will be activated. As the client information is entered the right-hand side result screen is also populated simultaneously.

Coverage

TERM CLIENT [COVERAGE](#) [RIDERS](#)

New Case Calculate AAR Report eApp

Illustration Date * 8/27/2021

Plan Code Level Term 10

Class Standard Non-Nicotine

Rating

Pay Mode Monthly

Solve Type Premium Amount

Face Amount \$100,000

Enter between Minimum \$100,000 - Maximum \$10,000,000

TERM SUMMARY VIEW **GRID VIEW**

Deb Maji
Male | 32 | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Level Term 10	\$100,000	
Total Monthly Premium		

SAVE

Powered by OPUS | © 2021 Illustrate inc

The range the field support is shown as part of tool tip so to guide the user. If mandatory field is missing correct information, appropriate error message will be shown.

Riders

TERM CLIENT [COVERAGE](#) [RIDERS](#)

New Case Calculate AAR Report eApp

Waiver of Premium Rider

Accidental Death Benefit (ADB)

Amount \$100,000

TERM SUMMARY VIEW **GRID VIEW**

Deb Maji
Male | 32 | Standard Non-Nicotine | Texas






Coverage	Amount	Monthly
Level Term 10	\$100,000	
Waiver Of Premium		
Accidental Death Benefit	\$100,000	
Total Monthly Premium		

SAVE

Powered by OPUS | © 2021 Illustrate inc

Input tab to capture rider information if any. In case rider is opted but information is not provided, error msg will be displayed.

If the agent comes from quote compare screen, with a prior selection of a plan, the age, Gender, Face Amount

New Case Calculate AAR Report eApp

TERM SUMMARY VIEW **GRID VIEW**

Deb Maji
Male | 32 | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Level Term 10	\$100,000	
Waiver Of Premium		
Accidental Death Benefit	\$100,000	
Total Monthly Premium		

SAVE

New Case for opening a new illustration case. On clicking of this button if there is any illustration in progress, system will prompt option to save that illustration before opening a new illustration (with an option to create a new one for same client or a new client). Save functionality will be discussed later.

Calculate

Navigation icons: New Case, Calculate, AAR, Report, eApp

TERM SUMMARY VIEW **GRID VIEW**

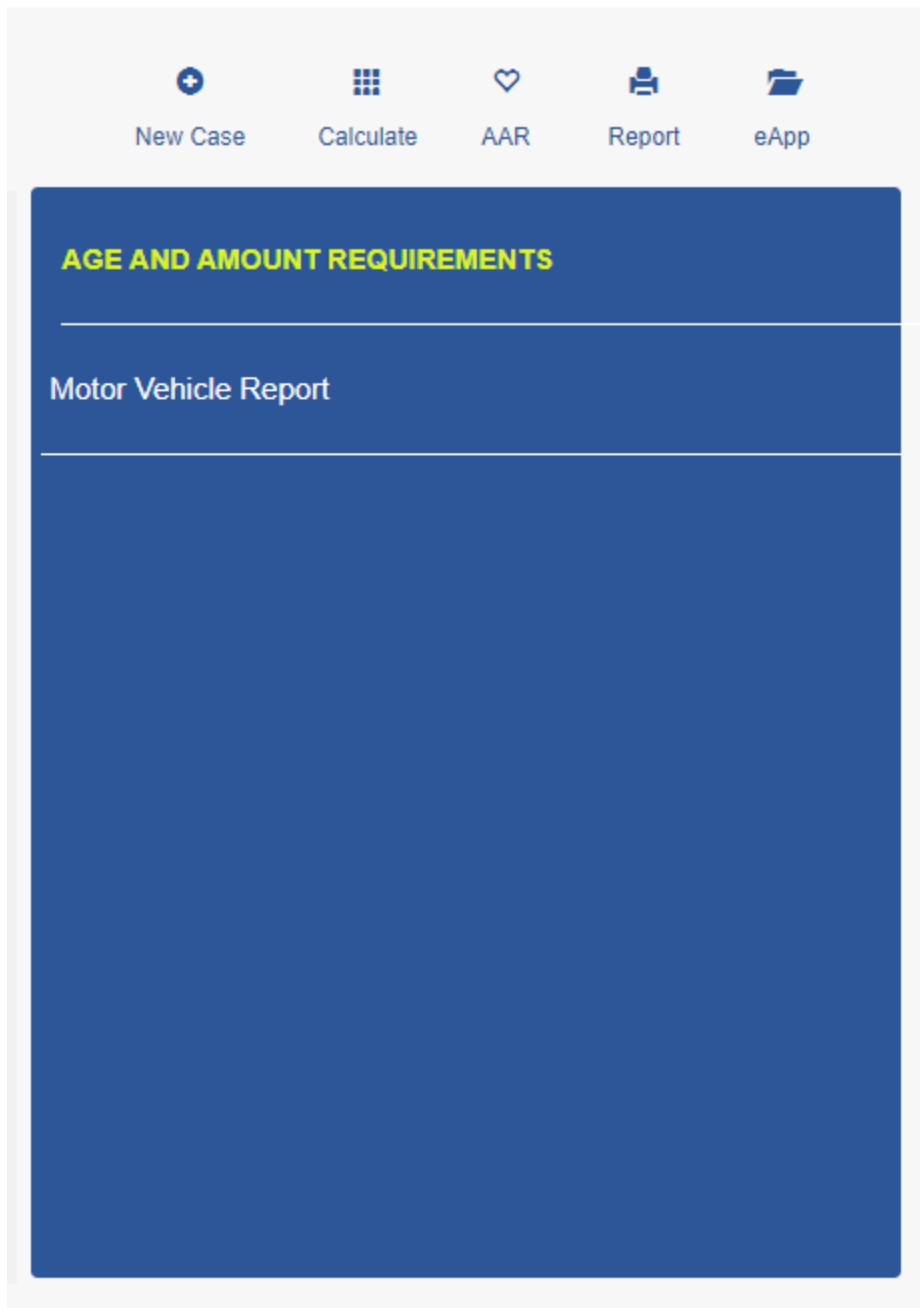
Deb Maji
Male | 32 | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Level Term 10	\$100,000	\$16.75
Waiver Of Premium		\$0.85
Accidental Death Benefit	\$100,000	\$9.35
Total Monthly Premium		\$26.95

SAVE

Calculate Premium based on the inputs

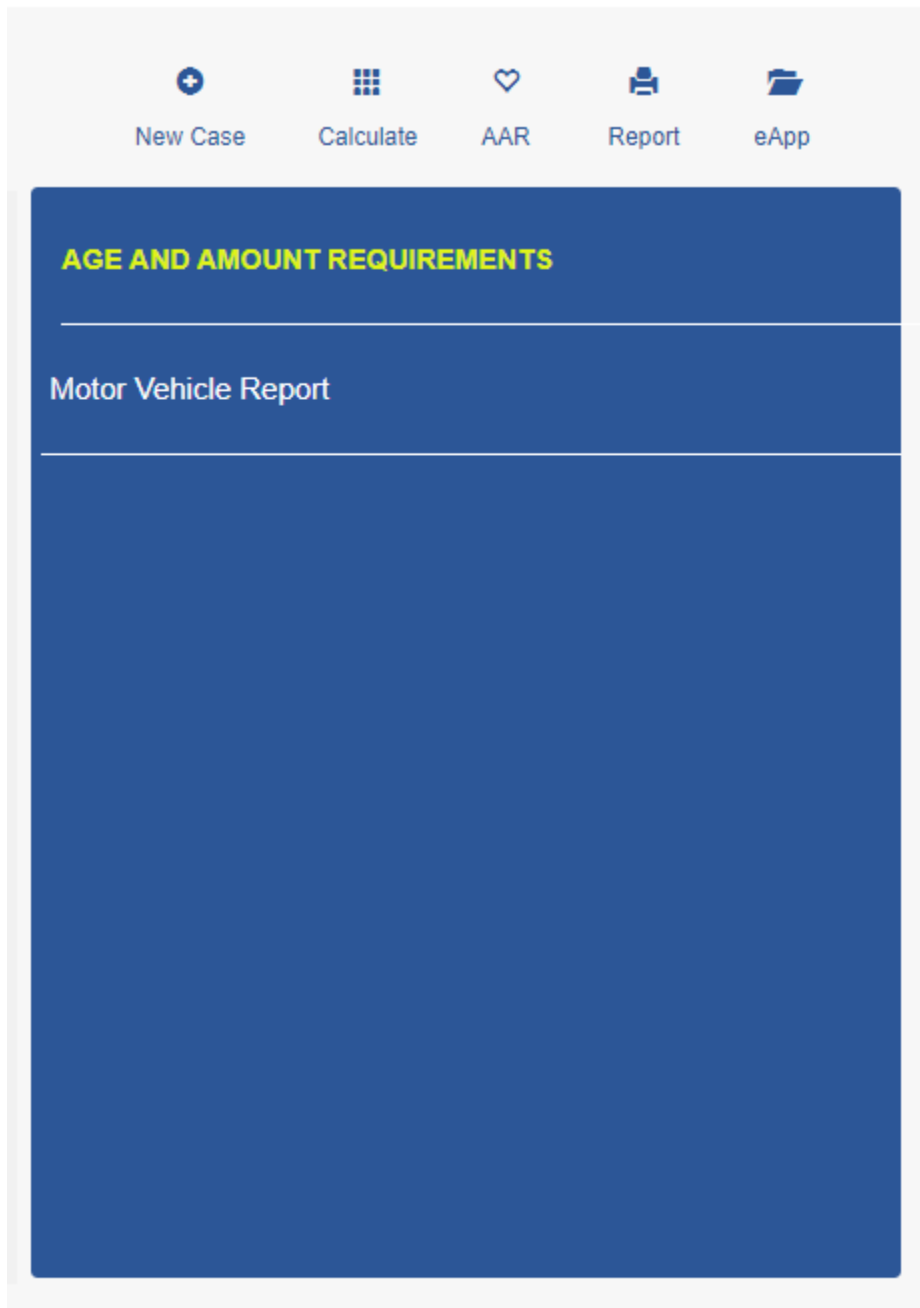
AAR



SAVE

Display AAR basis input

Viewing illustration Report



SAVE

Allows the agent to view the illustration report.

Save

The screenshot shows the 'TERM' insurance quote interface. On the left, there are checkboxes for 'Waiver of Premium Rider' and 'Accidental Death Benefit (ADB)', with an 'Amount' field set to '\$100,000'. On the right, there are sections for 'AGE AND AMOUNT REQUIREMENTS' and 'Motor Vehicle Report'. A modal dialog box titled 'Enter Quote Description' is open in the center, with a text input field containing 'Deb Maji 8/27/2021' and 'Ok' and 'Cancel' buttons. At the bottom right, there is a 'SAVE' button. The footer text reads 'Powered by OPUS | © 2021 Illustrate Inc.'

Allows to Save illustration. Saving of illustration case requires the agent to enter Customer's first name, last name and date of birth under client tab if not entered. Please not to generate quote/illustration First Name, Last Name and Date of Birth are not required. While saving the agent can change the default case name. Post Saving there will be a confirmation message as shown.

This screenshot shows the same insurance quote interface as above, but with a confirmation dialog box titled 'Case Saved' open in the center. The dialog box contains the message 'The case 'Deb Maji 8/27/2021' has been saved.' and an 'Ok' button. The background interface is dimmed. The 'SAVE' button is visible at the bottom right, and the footer text 'Powered by OPUS | © 2021 Illustrate Inc.' is at the bottom.

Retrieving and Editing an existing case

Scenario 1

The save Case can be accessed from dashboard and Case Management menu. If the agent makes any change to a saved case and wants to save again, the system will prompt whether the case should be saved for a new client,

TERM CLIENT COVERAGE RIDERS

CLIENT INFORMATION

First Name * Richard
Last Name * Beck
State of Issue * Texas
Sex * Male
Date of Birth * 1/1/1979
Will the Proposed Insured be the Owner? Yes No

SELECT CLIENT

TERM SUMMARY VIEW GRID VIEW

Richard Beck
Male | 42 | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Term 10	\$100,000	
Monthly Premium		

SAVE

Powered by OPUS | © 2021 illustrate inc

New Client
Is this a new client?
Yes No

If the agent selects Yes, the system will create another client on the back ground and save the case information as a new case for a new client.

TERM CLIENT COVERAGE RIDERS

CLIENT INFORMATION

First Name * Richard
Last Name * Beck
State of Issue * Texas
Sex * Male
Date of Birth * 1/1/1979
Will the Proposed Insured be the Owner? Yes No

SELECT CLIENT

TERM SUMMARY VIEW GRID VIEW

Richard Beck
Male | 42 | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Term 10	\$100,000	\$17.43
Monthly Premium		\$17.43

SAVE

Case Saved
The case 'Richard Beck 8/27/2021' has been saved.
Ok

Scenario 2

Post editing an existing case if the agent say No the system will understand that the case pertains to the same client and will prompt further if the agent wants to Overwrite an existing case or create a new case

The screenshot displays a web application interface for a term life insurance policy. The main content area is titled 'TERM SUMMARY VIEW' and shows the following information:

- Client: Richard Beck
- Demographics: Male | 42 | Standard Non-Nicotine | Texas
- Coverage Table:

Coverage	Amount	Monthly
Term 10	\$100,000	
Waiver of Premium		\$0.00
Monthly Premium		

A modal dialog box is overlaid on the screen with the following text:

Do you want to overwrite current case?

Click Yes to overwrite. No to create a new. Cancel to stop saving

Buttons: Yes, No, Cancel

At the bottom right of the main interface is a 'SAVE' button. The footer text reads 'Powered by OPUS | © 2021 Illustrate Inc'.

If the agent opts Yes then the case will be overwritten with new information. If selected as No then then a new case will be created.

Please note if the agent changes an personal information of the client as part of editing the case and decides not to save the case for existing client, the same personal information will be updated for all the other cases pertaining to the client. Hence, it's recommended not to change personal information (Age, Gender, First Name, Last Name etc) unless the agent is absolutely certain about it.

eApp button

Navigation bar with icons and labels: New Case, Calculate, AAR, Report, eApp.

TERM SUMMARY VIEW **GRID VIEW**

Richard Beck
Male | 42 | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Level Term 10	\$100,000	\$17.43
Waiver Of Premium		\$2.38
Total Monthly Premium		\$19.81

Allows the agent to go to eApp Module.

eApp Overview

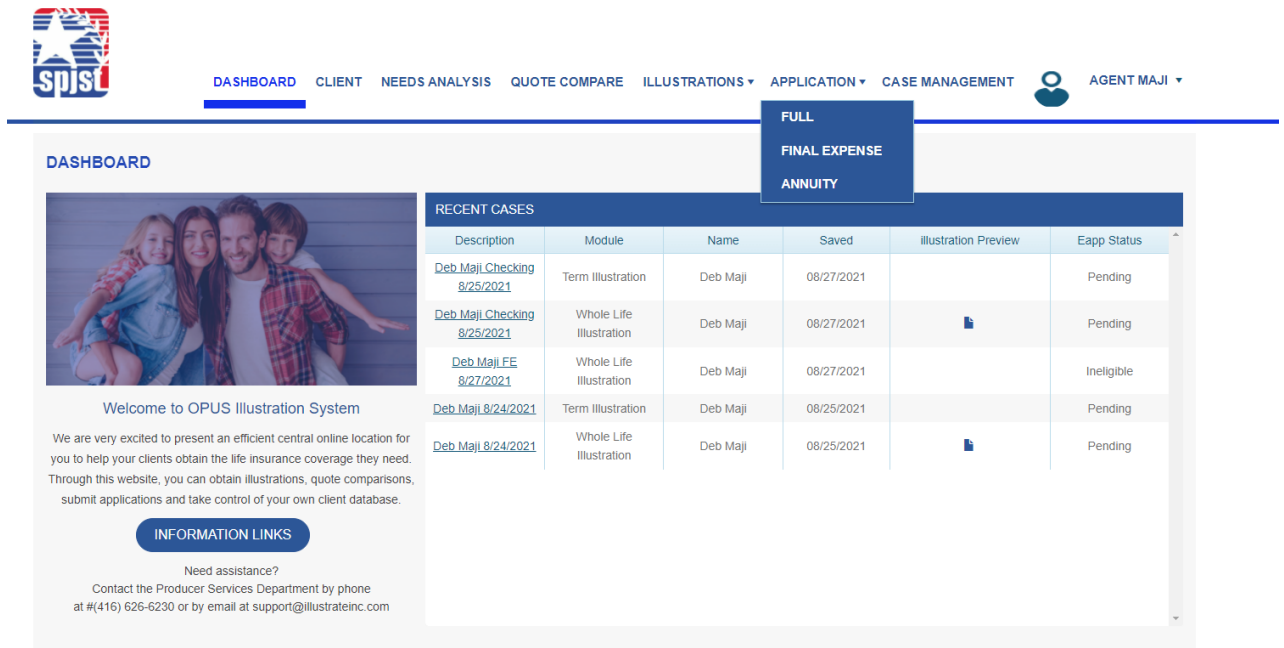
How to access

eApp Module can be accessed by 2 ways

1. The user can generate an illustration and click of eApp button to access the eApp flow as shown above

Or

2. The user can access e-App directly by clicking on Application link from top menu and selecting and application



DASHBOARD



Welcome to OPUS Illustration System

We are very excited to present an efficient central online location for you to help your clients obtain the life insurance coverage they need. Through this website, you can obtain illustrations, quote comparisons, submit applications and take control of your own client database.

INFORMATION LINKS

Need assistance?
Contact the Producer Services Department by phone at #(416) 626-6230 or by email at support@illustrateinc.com

RECENT CASES

Description	Module	Name	Saved	Illustration Preview	Eapp Status
Deb Maji Checking 8/25/2021	Term Illustration	Deb Maji	08/27/2021		Pending
Deb Maji Checking 8/25/2021	Whole Life Illustration	Deb Maji	08/27/2021		Pending
Deb Maji LFE 8/27/2021	Whole Life Illustration	Deb Maji	08/27/2021		Ineligible
Deb Maji 8/24/2021	Term Illustration	Deb Maji	08/25/2021		Pending
Deb Maji 8/24/2021	Whole Life Illustration	Deb Maji	08/25/2021		Pending

Powered by OPUS | © 2021 Illustrate Inc

Generic Overview of eApp

Full Application Supports Term, Whole Life and Universal Life Products.

Final Expense Application supports Final Expense

Annuity Application supports MYGA and FPDA Annuity

The full application provides the convenience of attaching multiple plans (1 from each Term, WL and Universal Life) to the same application.

Screens and Navigations

The screenshot displays the 'PROPOSED INSURED' screen. At the top, there are tabs for 'PROPOSED INSURED', 'INSURED', and 'RESIDENCE'. On the right, there are buttons for 'New Case' and 'Report'. The main form contains fields for 'Lodge #', 'First Name', 'Middle Name', 'Last Name', 'Date of Birth', 'Age', 'Sex', 'Social Security #', 'Drivers License #', 'Drivers License State', 'Place Of Birth', and 'Citizen of USA'. A 'SELECT CLIENT' button is circled in red. On the right-hand side navigation menu, the 'PROPOSED INSURED' item is circled in red. At the bottom right, a 'NEXT' button is also circled in red.

eApp is a form-based application capturing all the necessary information for the application. The are main screens and sub screens accessed through tabs or popups.

User can navigate between main screens using Prev Next button in the below or clicking on one of the links from right hand side navigation for unrestricted access.

While browsing through the right-hand side navigation, the application does not check for screen validation, however advancing through next button will allow the user to proceed to the next screen only after completing the screen with respect to all screen validation.

The screenshot shows the 'SELECT CLIENT' popup screen. On the left, there are search criteria fields for 'First Name', 'Last Name', 'City', and 'State'. At the bottom left, the 'START SEARCH' button is circled in red. On the right, there is a table of search results with columns for 'First Name', 'Last Name', 'AddressLine1', 'City', and 'State'. The table contains three rows of client information.

First Name	Last Name	AddressLine1	City	State
Richard	Beck		urdey	Texas
Deb	Maji	Deb St		Texas
Deb	Maji	484 Bartley Bull Pky	Brampton	Texas

While the application opens with a blank form with none of the field populated, the agent has an option to choose a client he might have saved before. In that case the agent can click on select client and personal record will be populated. In case the agent is coming from illustration the client information such as first name, Last Name, Age, DOB will be pre populated and uneditable.

Plan of Insurance When eApp is accessed directly

PLAN OF INSURANCE PLAN PREMIUM

UNIVERSAL LIFE WHOLE LIFE **TERM LIFE**

New Case Report

- PROPOSED INSURED
- PLAN OF INSURANCE**
- OWNER
- BENEFICIARY
- EXISTING COVERAGE
- UNDERWRITING
- PRODUCER'S REPORT
- SUBMIT

PREVIOUS SAVE NEXT

From the plan of insurance the agent can choose and 1 plan for each of the product and add. While click on any plan as shown above the agent will be taken to the illustration screen.

TERM CLIENT COVERAGE RIDERS

New Case Calculate AAR Report eApp

SELECT CLIENT

CLIENT INFORMATION

First Name * Richard
Last Name * Beck
State of Issue * Texas
Sex * Male
Date of Birth * 1/1/1979
Age * 42

Will the Proposed Insured be the Owner?
 Yes No

TERM SUMMARY VIEW GRID VIEW

Richard Beck
Male | 42 | Standard Non-Nicotine | Texas

Coverage	Amount	Monthly
Level Term 10	\$100,000	\$17.43
Total Monthly Premium		\$17.43

SAVE

In the illustration screen the client information will be pre-populated. The agent can select an appropriate plan, coverage, riders etc by navigating through above tabs, Generate quote and go back to eApp by clicking on the eApp button once he is ready to proceed further with the application.

Adding additional Plan from Plan of Insurance Page

PLAN OF INSURANCE [PLAN](#) PREMIUM

New Case Report

ADD UNIVERSAL LIFE ADD WHOLE LIFE

EDIT TERM LIFE ILLUSTRATION

Product Type: Level Term 20 Face Amount: \$100,000

Waiver of Premium

Accidental Death Benefit \$100,000

- PROPOSED INSURED
- PLAN OF INSURANCE
- OWNER
- BENEFICIARY
- EXISTING COVERAGE
- UNDERWRITING
- PRODUCER'S REPORT
- ESIGNATURE

PREVIOUS SAVE NEXT

Please note that after the first plan is selected the additional plan from the same product will not be available to add further. Plan from other product will still be available to add.

The corresponding plan information and premium information and for each plan will be appeared as below

PLAN OF INSURANCE [PLAN](#) PREMIUM

New Case Report

ADD UNIVERSAL LIFE

TERM LIFE WHOLE LIFE

EDIT TERM LIFE ILLUSTRATION

Product Type: Level Term 20 Face Amount: \$100,000

Waiver of Premium

Accidental Death Benefit \$100,000

- PROPOSED INSURED
- PLAN OF INSURANCE
- OWNER
- BENEFICIARY
- EXISTING COVERAGE
- UNDERWRITING
- PRODUCER'S REPORT
- ESIGNATURE

PREVIOUS SAVE NEXT

PLAN OF INSURANCE

PLAN PREMIUM

New Case

Report

TERM LIFE

WHOLE LIFE

Amount of Insurance

\$100,000

Premium Mode

\$38.35

Cash with application

Billing Mode (Select one) *

Monthly ACH

Bank Name *

Bank Address *

City *

State *

Zip Code *

Name Shown *

Account

Checking Account

Draft Day *

Transit *

- ✓ PROPOSED INSURED
- PLAN OF INSURANCE <
- OWNER
- BENEFICIARY
- EXISTING COVERAGE
- UNDERWRITING
- PRODUCER'S REPORT
- ESIGNATURE

PREVIOUS

SAVE

NEXT

When eApp application is initiated from illustration

Insured Page

Following information of Primary Insured and Spouse will be carried forward to illustration

First Name – editable

Last Name – editable

Age and DOB – Non Editable

State of Birth – Editable

The screenshot displays the 'PROPOSED INSURED' page of an application system. The page has a header with tabs for 'PROPOSED INSURED', 'INSURED', 'RESIDENCE', and 'OCCUPATION'. A 'SELECT CLIENT' button is located in the top right. The main form contains the following fields:

- Lodge # *
- First Name * (Delsle)
- Middle Name
- Last Name * (Dorothy)
- Date of Birth * (1/1/1978)
- Age (43)
- Sex * (Male)
- Social Security # *
- Drivers License # *
- Drivers License State * (Texas)
- Place Of Birth * (Select Country)
- Citizen of USA (Yes No)

A sidebar on the right contains a navigation menu with the following items: PROPOSED INSURED (selected), PLAN OF INSURANCE, OWNER, BENEFICIARY, EXISTING COVERAGE, UNDERWRITING, PRODUCER'S REPORT, and ESIGNATURE. At the bottom right, there is a 'NEXT' button.

NEXT

Plan of Insurance Page

Plan details will be prepopulated and will be non-editable

The screenshot displays the 'Plan of Insurance' page in the SPJSL application. The top navigation bar includes 'DASHBOARD', 'CLIENT', 'NEEDS ANALYSIS', 'QUOTE COMPARE', 'ILLUSTRATIONS', 'APPLICATION' (selected), 'CASE MANAGEMENT', and 'AGENT MAJI'. The main content area features a 'PLAN OF INSURANCE' tab with sub-tabs for 'PLAN' and 'PREMIUM'. A 'New Case' button is located in the top right. The main form area contains an 'EDIT TERM LIFE ILLUSTRATION' button and two buttons: 'ADD UNIVERSAL LIFE' and 'ADD WHOLE LIFE'. Below these are input fields for 'Product Type' (Level Term 30) and 'Face Amount' (\$500,000). There are checkboxes for 'Waiver of Premium' and 'Accidental Death Benefit' with a corresponding input field for '\$200,000'. A right-hand navigation menu lists steps: PROPOSED INSURED (checked), PLAN OF INSURANCE (selected), OWNER, BENEFICIARY, EXISTING COVERAGE, UNDERWRITING, PRODUCER'S REPORT, and SUBMIT. At the bottom, there are 'PREVIOUS', 'SAVE', and 'NEXT' buttons.

User will be able to change selected values after going to illustration module (by clicking on the button above) and recalculate the quote

Navigation to Other pages

Other pages are self-explanatory and can be accessed by clicking next button at the bottom or clicking on a link from right hand navigation

Navigation through Prev or Next vs Right Hand side Link Access

User can navigate from one page to other forward and backward by clicking on Prev and Next button. Prev and Next Button helps user to page by page when all information for all the mandatory field has been entered correctly.

If the user wants to skip a page, user needs to click on one of the right-hand side navigation links based on target screen he wants to visit. Right Hand side navigation link does not check for validation rules and save the page with incomplete information.

Even if user can navigate to the last page, user will not be able to submit the application unless all the mandatory fields are answered correctly.

DocuSign

Once the application is complete and reviewed the docuSign process for e-Signature can be initiated. There are 2 options for signing.

In Person – In that case stake holders who are present and willing to sign in person have checked against their names and proceed with in person signing.

For Offline email workflow – The agent should not check the checkbox against any stake holder and proceed with submission. The system will initiate email workflow. There is a specific order of signing is pre-defined in the workflow, where the owner signs first and agent signs at last to complete the signing process. When an owner tries to open the document from email, he will be prompted security question before he can open and sign the document. This added layer of security safeguards from possible fraud.

DASHBOARD CLIENT NEEDS ANALYSIS QUOTE COMPARE ILLUSTRATIONS APPLICATION CASE MANAGEMENT AGENT MAJI

New Case Report

Congratulations! Your application is complete and ready to Sign!

Please review the application and all other forms in their entirety for accuracy, understanding and agreement. This application contains multiple pages and forms.

REVIEW APPLICATION

After reading all documents, check this box to indicate they have been read.

Thank you. Your application is ready to submit. Please click the submit button to send the application to SPJST Insurance. Once you click the submit button you will no longer be able to modify the application for any changes.

Please select the clients that are ready to sign now

Deb Maji	Debranjana.Maji@gmail.com	<input type="checkbox"/>
Agent Maji	debranjana.maji@illustrateinc.com	<input type="checkbox"/>

SUBMIT FOR SIGNING

PROPOSED INSURED
PLAN OF INSURANCE
OWNER
BENEFICIARY
EXISTING COVERAGE
UNDERWRITING
PRODUCER'S REPORT
E-SIGNATURE

PREVIOUS SAVE

The status of signing process can be tracked from dashboard by clicking the status link against that case.



DASHBOARD



Welcome to OPUS Illustration System
 We are very excited to present an efficient central online system to help you help your clients obtain the life insurance coverage they need. Through this website, you can obtain illustrations, quote comparisons, submit applications and take control of your own client database.

INFORMATION LINKS

Need assistance?
 Contact the Producer Services Department by phone at #(416) 626-6230 or by email at support@illustrateinc.com

RECENT CASES

Description	Module	Name	Saved	Illustration Preview	Eapp Status
Deb Maji Test 8/30/2021	Term Illustration	Deb Maji	09/02/2021		Out for Signature
Delisle Dorothy 8/29/2021	Term Illustration	Delisle Dorothy	08/29/2021		Pending
Deb Maji 8/27/2021	Whole Life Illustration	Deb Maji	08/27/2021		Pending
Deb Maji 8/27/2021	Whole Life Illustration	Deb Maji	08/27/2021		Pending
Deb Maji 8/27/2021	Whole Life Illustration	Deb Maji	08/27/2021		Ineligible
Deb Maji 8/24/2021	Term Illustration	Deb Maji	08/25/2021		Pending
Deb Maji 8/24/2021	Whole Life Illustration	Deb Maji	08/25/2021		Pending

Electronic Signing Status

Deb Maji : Signed
 Agent Maji : Email has been sent for signing

OK