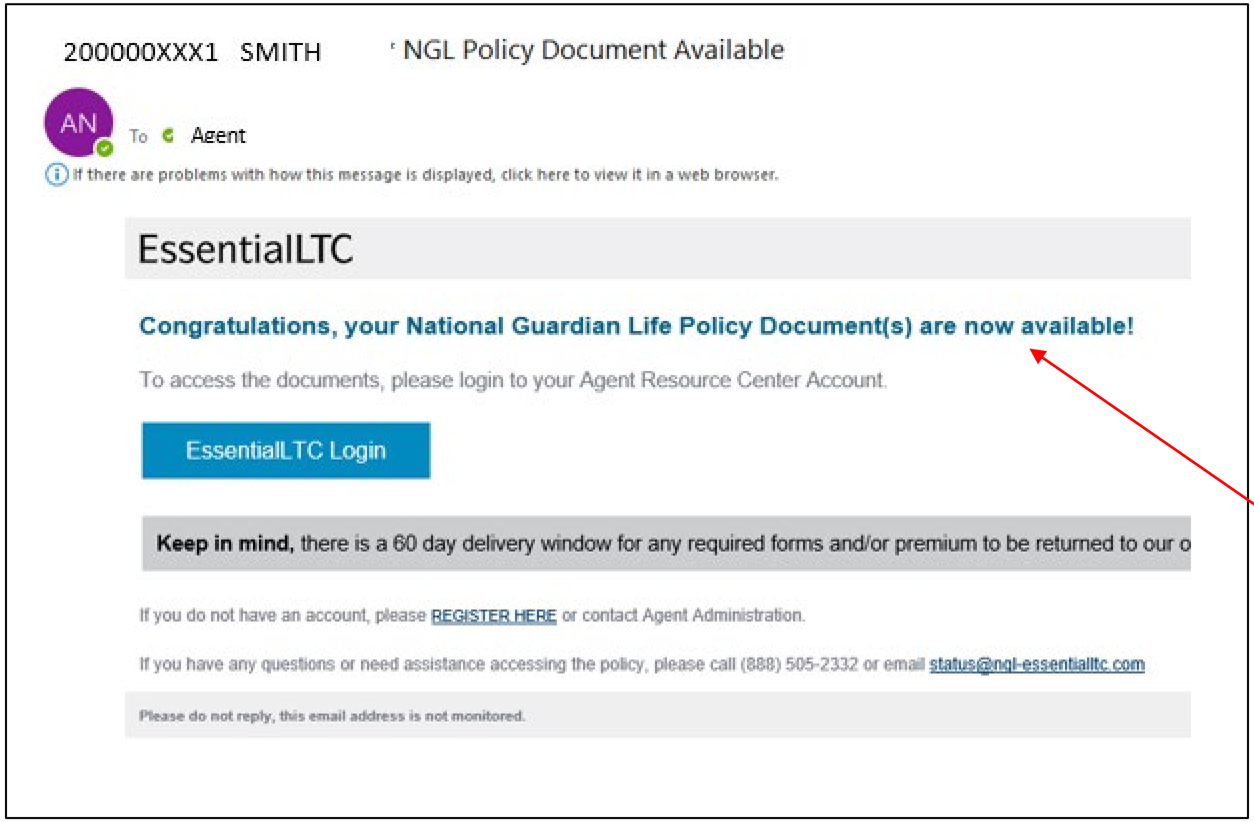
e-Policy Delivery Guide

Email Notification



200000XXX1 SMITH NGL Policy Document Available

AN To Agent

If there are problems with how this message is displayed, click here to view it in a web browser.

EssentialLTC

Congratulations, your National Guardian Life Policy Document(s) are now available!

To access the documents, please login to your Agent Resource Center Account.

EssentialLTC Login

Keep in mind, there is a 60 day delivery window for any required forms and/or premium to be returned to our o

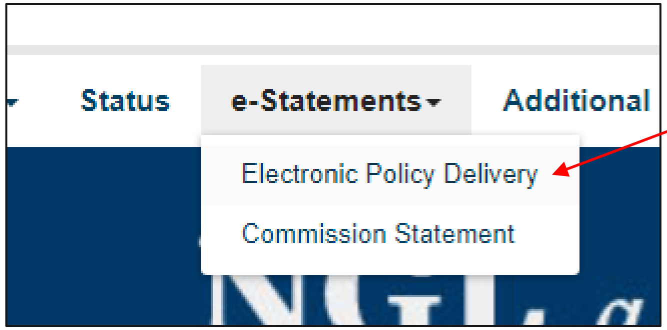
If you do not have an account, please REGISTER HERE or contact Agent Administration.

If you have any questions or need assistance accessing the policy, please call (888) 505-2332 or email status@ngl-essentialltc.com

Please do not reply, this email address is not monitored.

When a policy is issued you will receive an email instructing that the policy documents are available on the **Agent Resource Center** (ARC).

Where to Find the e-Policy Delivery

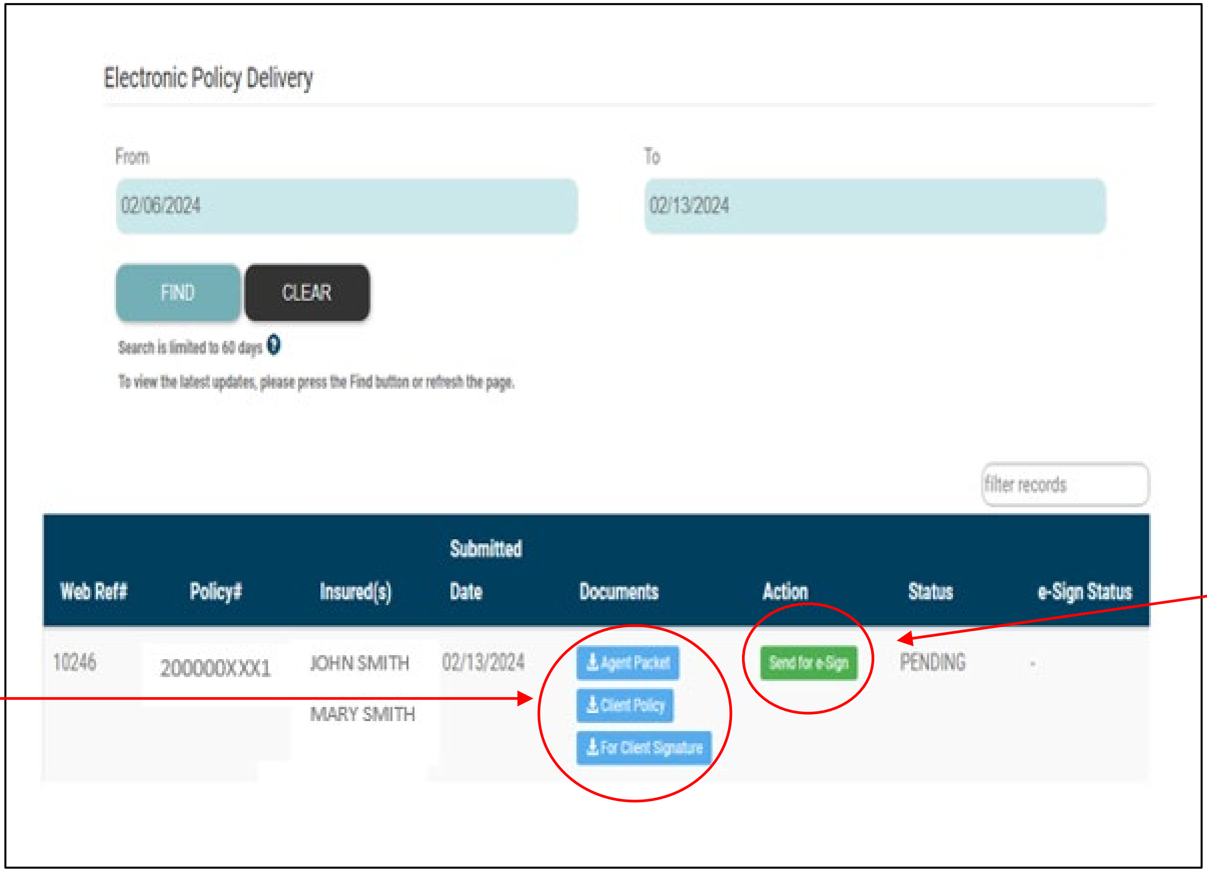


You can find the Electronic Policy Delivery dropdown under the **e-Statements** dropdown.

Agent
e-Policy Delivery
Process

e-Policy Delivery Screen

On the **Electronic Policy Delivery** screen, you will be able to access any policy issued within the last 60 days.



Click the blue buttons to download a copy of the policy to your computer.

Click the green button to email a link to your clients where they can securely download and sign their documents, if needed.

Starting e-Policy Delivery

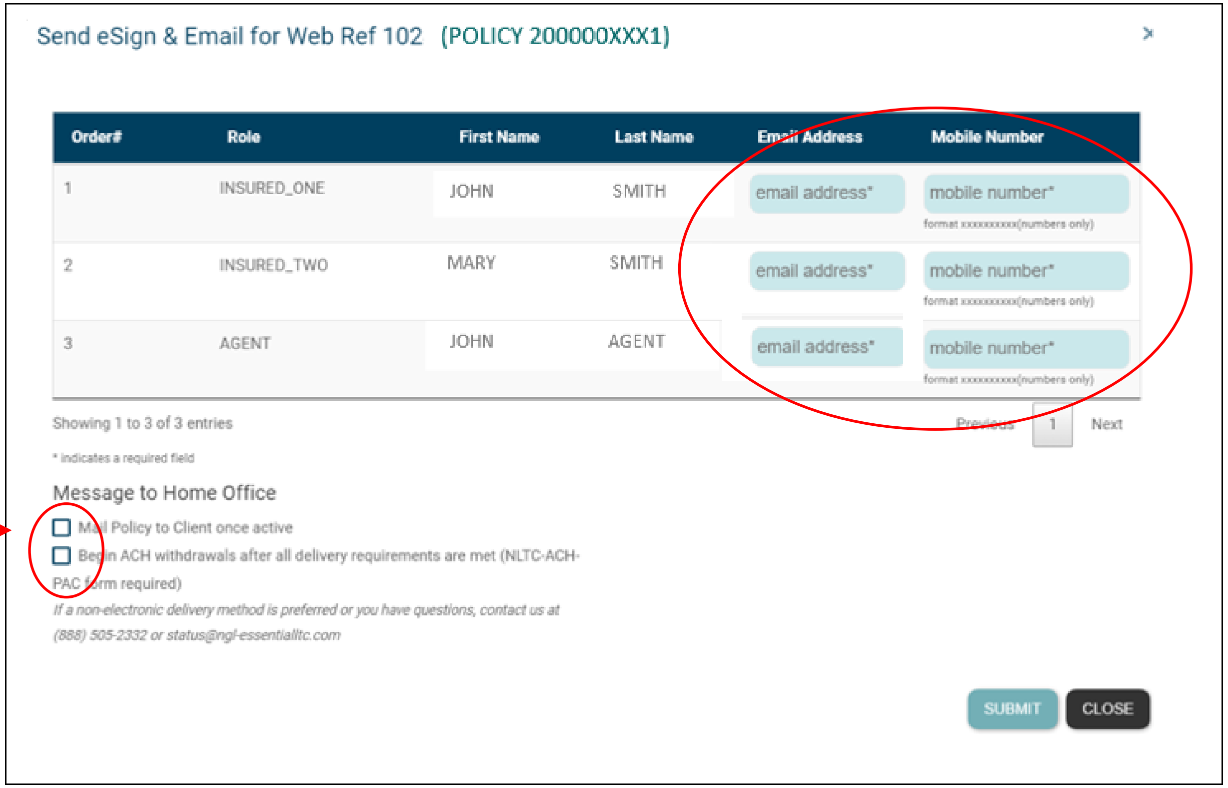
Once the green **Send for e-sign** button is selected, you can provide the email address and mobile number for each client so they can get secure access to the download link.

Select the appropriate check box(es):

- If client wants paper copy of the policy once it becomes active

  and/or

- To provide approval to process the ACH process once all other delivery requirements are received, as applicable



e-Policy Delivery Process

1. After entering email address/phone numbers and clicking **Submit**, the top of the pop up will turn green with the following message:

Send eSign & Email for Web Ref 1024 (Policy 200000XXX1)

Success! request submitted.

2. The **Electronic Policy Delivery** screen will now have the option to **Resend for e-Sign**.

Web Ref#	Policy#	Insured(s)	Submitted Date	Documents	Action	Status	e-Sign Status
10246	200000XXX1	JOHN SMITH MARY SMITH	02/13/2024	Agent Packet Client Policy For Client Signature	Resend for e-Sign	IN-PROGRESS	Sent for e-signing.

howing 1 to 1 of 1 entries

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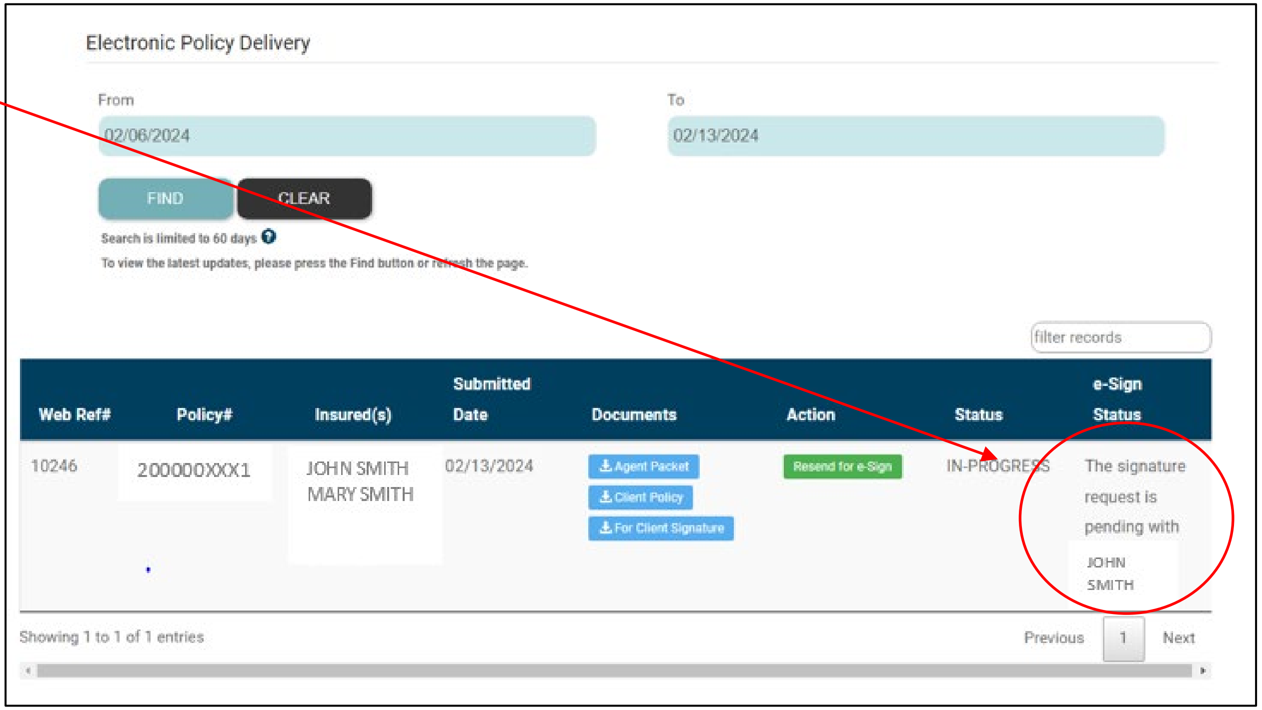
NGL

e-Policy Delivery process continued on the next page.

e-Policy Delivery Process

3. The **Electronic Policy Delivery** screen will update every few minutes with the e-Sign status so you can easily track its progress.



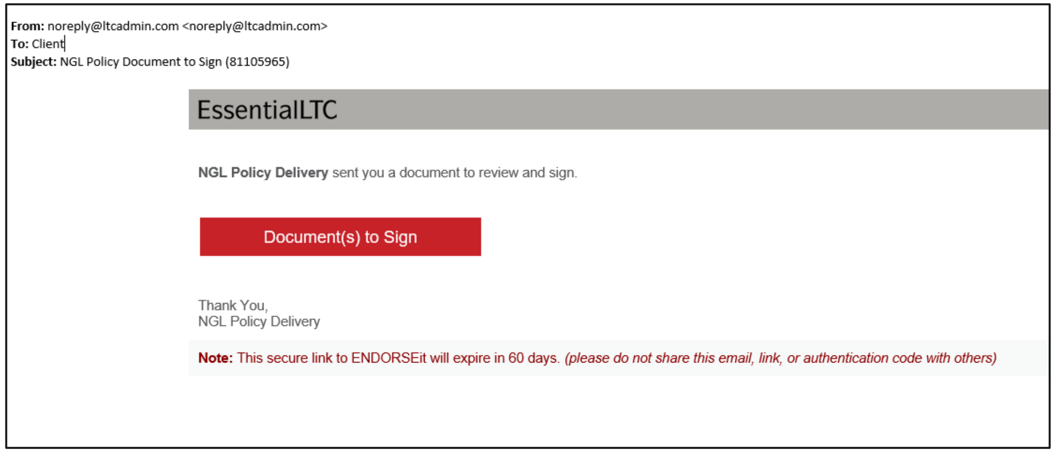
NGL

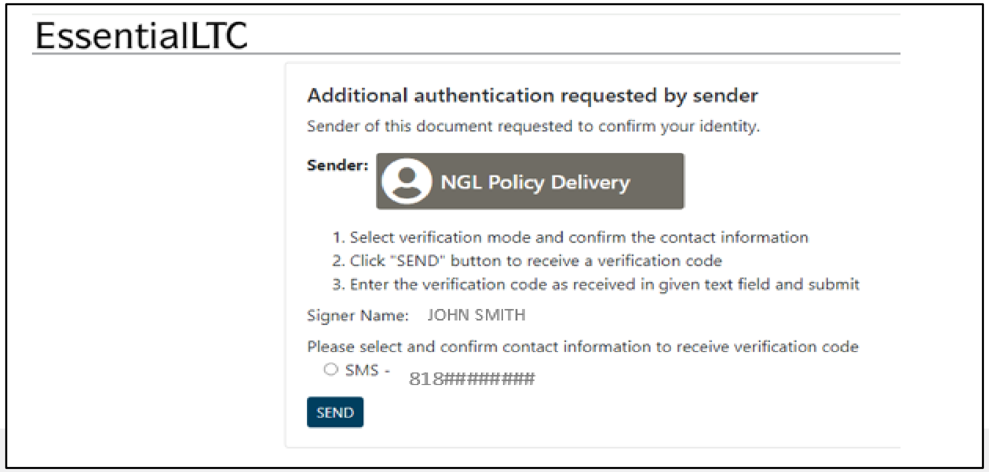
Client Signature Process

Client Signature Process

1. If signatures are required, the client will receive an email from **noreply@ltcadmin.com**, with the subject **NGL Policy Document(s) to Sign**, to complete their signatures securely. If they don't receive an email, we ask that the insured check their junk or spam folder before requesting a new email be sent.
   - *If there are two insureds on the policy, one insured will go through the signature process first. Then the other will receive an email to sign after the first insured has completed the process.*

2. When **Documents(s) to Sign** is selected, the signor will be taken to an authentication request in their browser. ***Please note:*** *The full mobile phone number of the client will be displayed.*

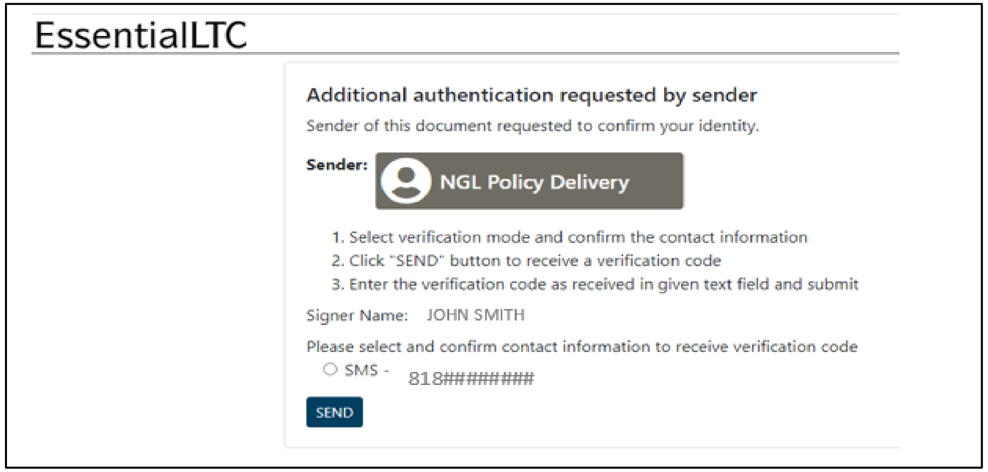




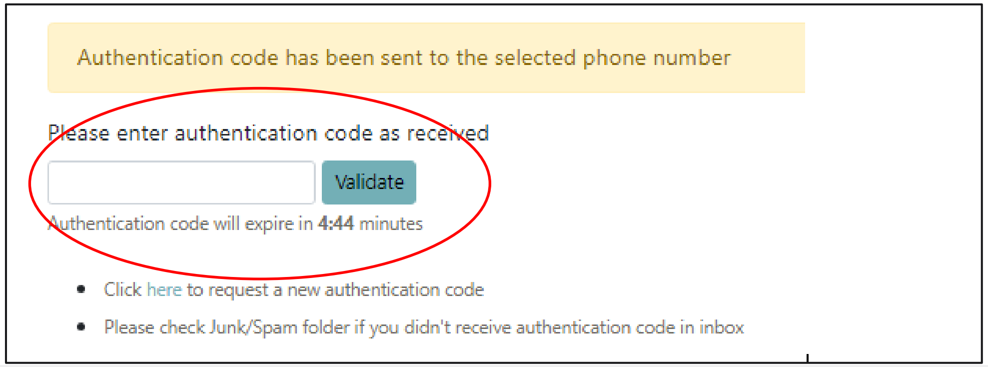
Client signature process continued on the next page

Client Signature Process

3. When **Send** is selected, a text containing an authentication code will be sent to the client's mobile number.



4. Once the text is sent, this screen will appear and they will input the authentication code.



Client signature process continued on the next page

Client Signature Process

5. Once the authentication code is entered, your client will be taken to the **Electronic Record and Signature Disclosure**.

In order to continue to the signatures, they will need to check the box next to **I agree to use electronic records and signatures**.

ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

Last updated on December 13, 2023

The Third Party Administrator (we, us or Company) is providing you with a copy of the long term care policy on behalf of National Guardian Life, the insurer. Described below are the terms and conditions for providing to you this information electronically through our eSignature application. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please approve by clicking the 'I agree' button at the bottom of this document.

Getting paper copies

As long as you are an authorized user of this system you will have the ability to download and print any documents using the link in the e-mail which we will send after you have completed signing the document. There will be a limited period of time (60 days) after such documents are first sent to you that you may access them electronically. After this time, or anytime you wish to request them, you may request paper copies of the Policy from us by following the procedure provided below.

To request paper copies from us

To request paper copies of the Policy previously provided by us to you electronically, you may submit a request through your agent.

Required hardware and software

Browsers (for SENDERS)	Latest stable releases of Chrome, Firefox, Microsoft Edge, Safari
Browsers (for SIGNERS)	Latest stable releases of Chrome, Firefox, Microsoft Edge, Safari

Email	Access to a valid email account
Screen Resolution	1024 x 768
Enabled Security Settings	• Allow per session cookies • Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection

** These minimum requirements are subject to change. If these requirements change, we will provide you with an e-mail message at the e-mail address we have on file for you at that time providing you with the revised hardware and software requirements, at which time you will have the right to withdraw your consent.

Acknowledging your access and consent to receive materials electronically

To confirm to us that you can access this information electronically, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access, or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Please let us know by clicking the 'I agree' button below.

By checking the 'I Agree' box, I confirm that:

1. I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
2. I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access.

☐ I agree to use electronic records and signatures.

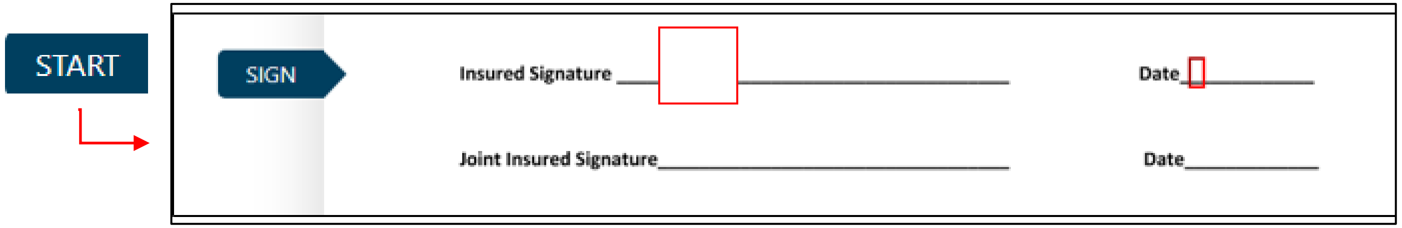
Continue

NGL

Client signature process continued on the next page

Client Signature Process

6. The policy documents will appear once the client agrees to the electronic records and signatures (previous page). They will have the opportunity to scroll through and review the documents. When they are ready to proceed, they will select the **Start** button and be taken to the first signature location.

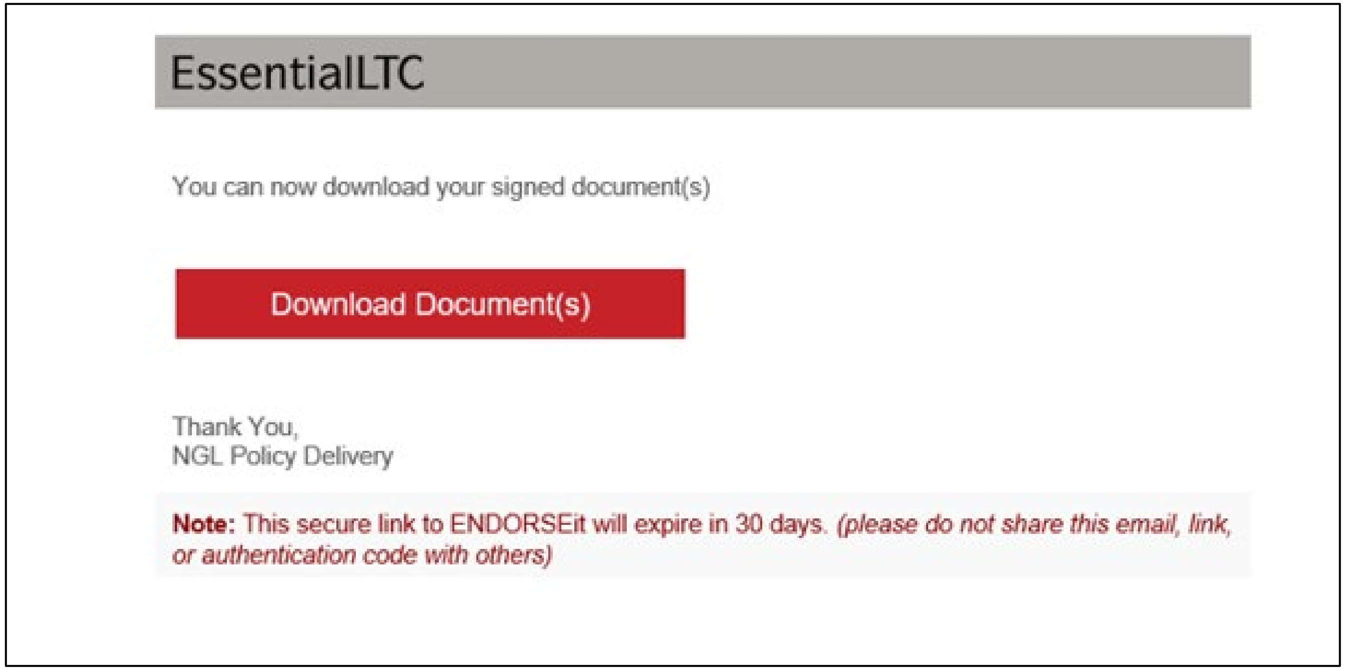


7. The client can adopt the style of signature and initials by clicking on the red box next to the signature. Selecting **Adopt and Sign** will return them to the signature process.

Client signature process continued on the next page

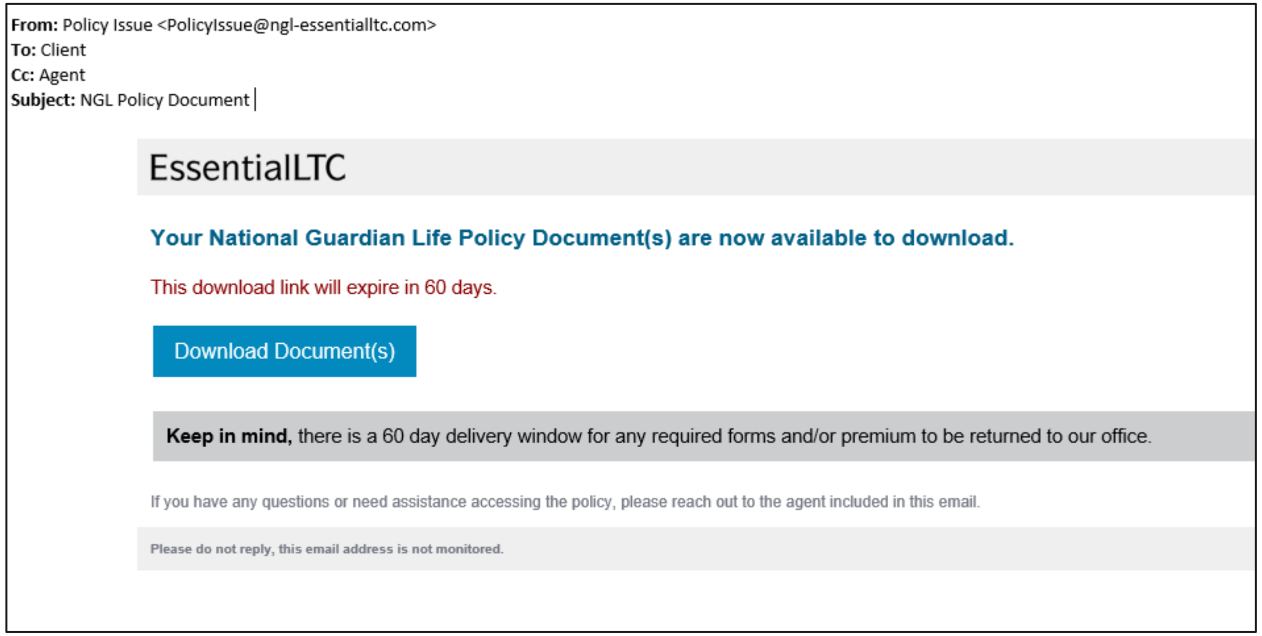
Client Signature Process

8. Once all signatures have been completed, the applicant(s) and agents will receive an email informing they can access and download the completed documents. NGL's LTC Administration will be also alerted at this time that the signatures have been complete.



Paperwork Download

If no signatures are needed…


From: Policy Issue <PolicyIssue@ngl-essentialltc.com>
To: Client
Cc: Agent
Subject: NGL Policy Document

EssentialLTC

Your National Guardian Life Policy Document(s) are now available to download.

This download link will expire in 60 days.

Download Document(s)

Keep in mind, there is a 60 day delivery window for any required forms and/or premium to be returned to our office.

If you have any questions or need assistance accessing the policy, please reach out to the agent included in this email.

Please do not reply, this email address is not monitored.

If there are no signatures required, the client will get an email from policyissue@ngl-essentialltc.com, to download the paperwork. The agent will also be cc'd on this email.

This completes the e-Policy delivery process!

Contact our Agent Services Team with questions.

Phone: 888.505.2332
Email: status@ngl-essentialltc.com

NGL®