QuickStart Guide

⊡ **ExpertApp**

AMERICAN NATIONAL

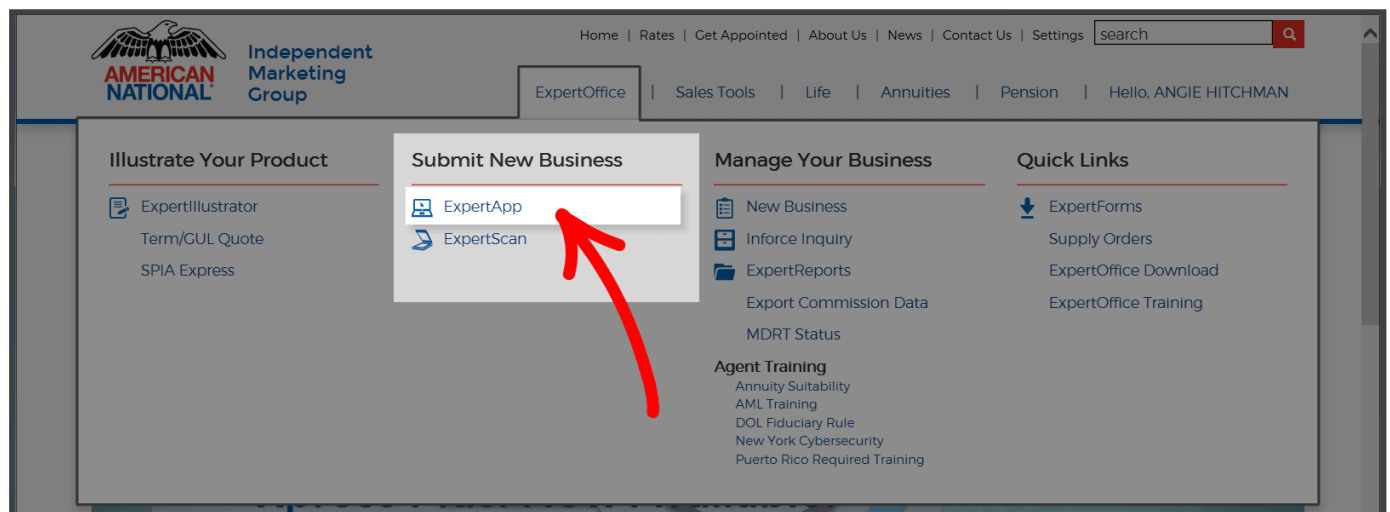**ExpertApp is the tool within ExpertOffice used to electronically submit life applications/cases. Illustrations can also be created completely offline using the ExpertOffice Desktop App.**

1 Accessing ExpertApp from the IMG Website

From the IMG website portal drop-down menu **https://img.anicoweb.com** select ExpertOffice > **ExpertApp**.

2 ExpertApp within the ExpertOffice App Download

To download the ExpertOffice App, visit **expertoffice.anicoweb.com**.

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3 ExpertApp Dashboard

The ExpertApp Dashboard displays all the applications/cases you have created and their current status.

Name	Status	Product	Policy #	Modified ▾
Client, Mrs	Pending Submission ❶	Signature IUL		2/27/19 2:46 PM
Client, Mrs	Started	Signature Guaranteed UL Simplif...		2/21/19 9:21 AM
Client, Mrs.	Started	Signature Guaranteed UL Simplif...		2/21/19 9:05 AM
Client, Valued	Started	ANICO Signature Term		2/19/19 3:24 PM

Cases ❹   Start New Case

|◀ ◀ 1 / 1 ▶ ▶| 25 ∨ items per page   1 - 4 of 4 items

4 Case Details — Quick Glance

To quickly view the details and history of a application/case, select the case from the list, then select the **Case Details button**. A new screen with the case details will appear.

Cases ❹   Case Details   Open Case   Delete Case   Start New Case

Name	Status	Product	Policy #	Modified ▾
Client, Mrs	Pending Submission ❶	Signature IUL		2/27/19 2:46 PM
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Client, Mrs.	Started	Signature Guaranteed UL Simplif...		2/21/19 9:05 AM
Client, Valued	Started	ANICO Signature Term		2/19/19 3:24 PM

Case Details

Policy Number:	
Insured Name:	Mrs Client
Age:	40
Product Type:	Universal Life
Product:	Signature IUL
Face Amount:	$50,000.00
Riders:	
Status:	Pending Submission

Open Case   Transfer Case

Case History

Started:	02/19/2019 11:15:19 AM
Locked:	02/27/2019 02:26:01 PM

RemoteSign/RapidSign Status

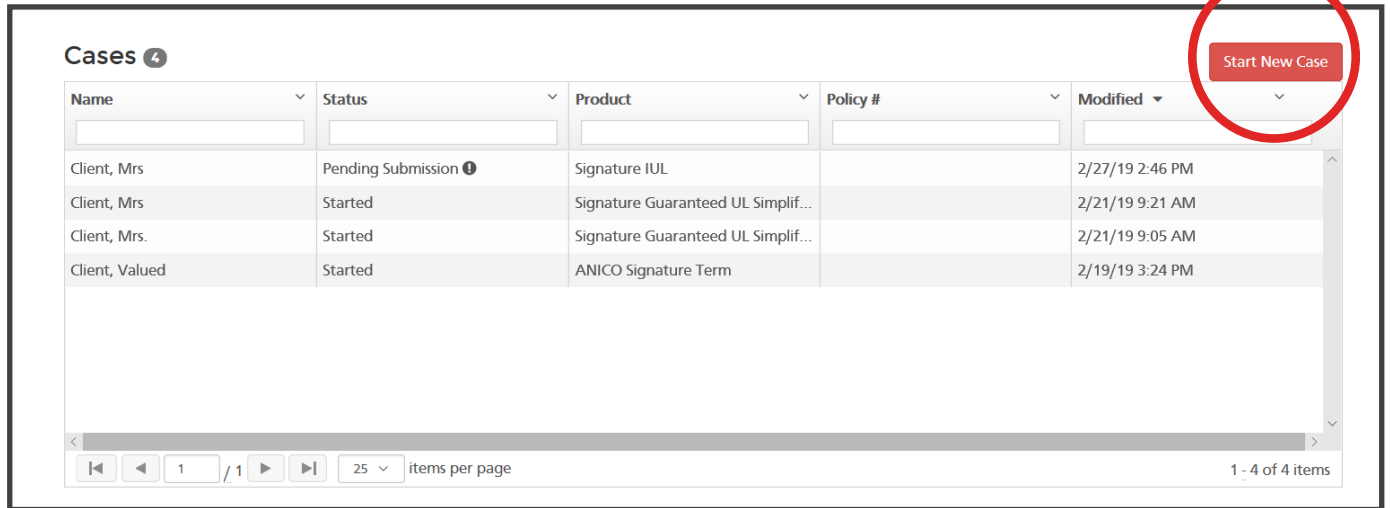|	
Client emails sent:	02/27/2019 02:26:20 PM
Agent - Valued Agent:	Complete 02/27/2019 02:45:39 PM
Insured - Mrs Client:	Complete 02/27/2019 02:28:11 PM
Signing complete:	02/27/2019 02:45:43 PM

Documents

Open the case to view the documents.

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5 Starting a Case

Select the **Start New Case button** to start a new application/case.
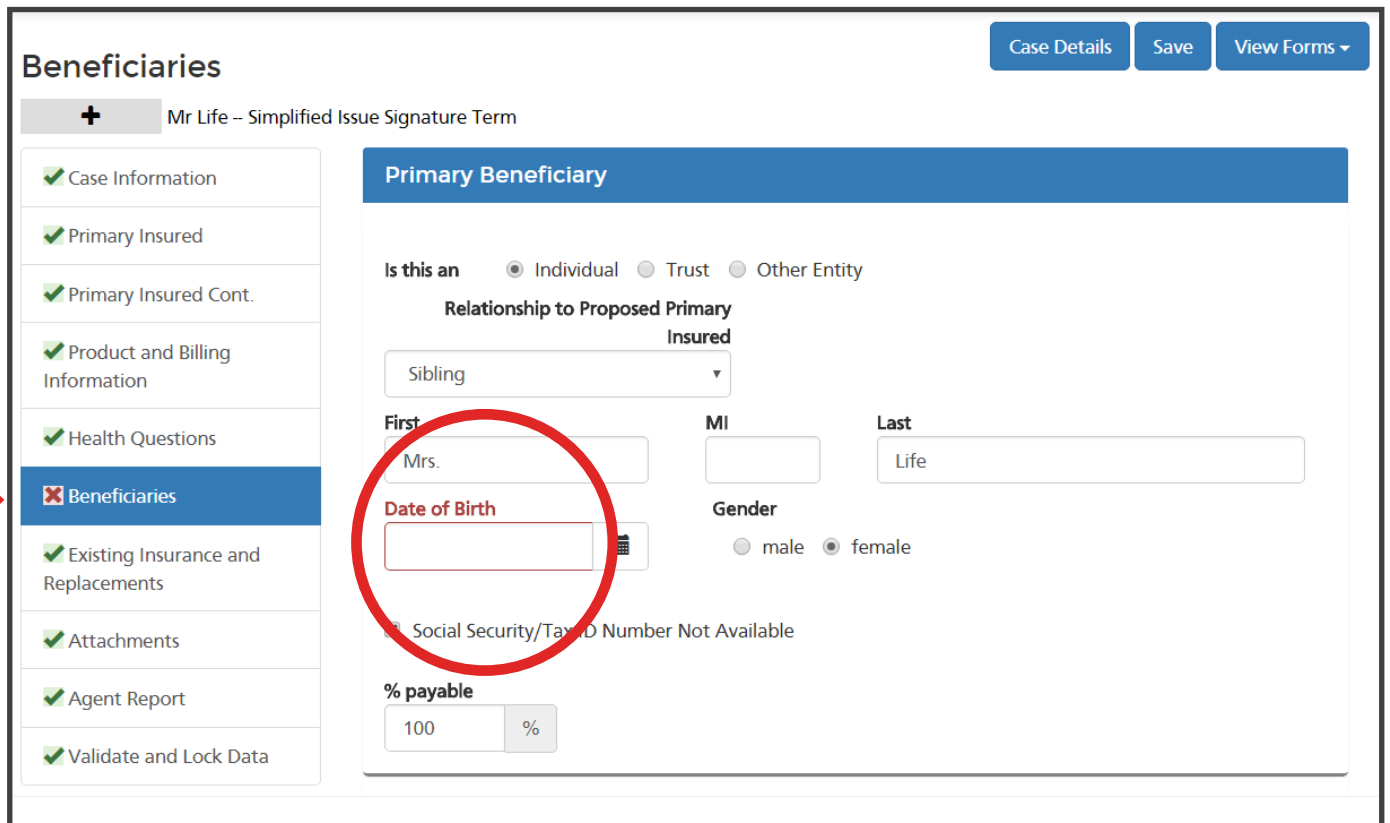
6 Filling Out the Case

Section tabs with a **red x** have incomplete required data fields (also displayed in red). A **green check-mark** will replace the **red x** when a section is complete. All sections of the application/case must be complete before it can be locked.

This is a "Smart App" so it will automatically populate all forms needed for the product and state chosen.

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7 **Locking a Case**

Once all the section tabs on the left have green check-marks the application/case is ready to be locked. Select the **Validate and Lock Data section,** then select the **Lock button** to lock the application/case.

Locking the application/case will also generate the final version of the PDF documents for signatures.

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⑧ Selecting the Signing Method

Select the corresponding button for the signing method you want to use.

Select Signing Method

ScriptSign	In order to use this digital signature method, you do not have to be connected to the internet. However, all signing parties must be present. This method allows you to capture signatures by using a mouse or touch screen.
RemoteSign / **Rapid**Sign	In order to use either of these two methods, you must be connected to the internet. *Remote*Sign - email documents to signing parties *Rapid*Sign - signing party is present with the agent to sign. Both methods allow a signature to be applied through a series of acknowledgments and a mix of these signature methods can be used for the same application. This is ideal when all signing parties are not available with the agent.
Print, sign and submit	Application is printed to paper and physically signed. Application is then submitted by traditional methods - uploading the scanned application to ExpertScan.

*Script*Sign

This is a digital signature process where all parties must be present to sign. Each person applies their physical signature using a mouse or touch screen. This is the only method available offline (using the ExpertOffice App).

*Remote*Sign/*Rapid*Sign

Both methods require an internet connection. *Remote*Sign and *Rapid*Sign methods allow a signature to be applied through a series of acknowledgments. A mix of these signature methods can be used for the same application.

- ### *Remote*Sign
  Documents are sent via email to the signing party. Your client will receive an email will all documents from their application. They will then go through a series of digital signatures until all documents have been signed.

- ### *Rapid*Sign
  The signator must be present in order to sign and will click inside of the signature boxes to apply their digital signature.

Print, sign and submit

The entire application is printed. The insurance agent and client will both physically sign all required documents. They are then submitted by traditional methods, or for your convenience you can upload the application directly into ExpertScan. This is treated as a paper application.

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9 Submitting a Case

Once all signatures are placed on the application/case, follow these steps and select the **Submit button**. A confirmation message will appear when the application/case has been successfully submitted and you will receive a policy number.

Step 1 : Check Signature Status and Retrieve Documents

signed documents retrieved ✔

Step 2 : Leave Behind Documents

Click the "Print Forms to Leave Behind" button to obtain the Leave Behind forms. These forms must either be printed and left with the applicant or saved as a PDF and sent to the applicant electronically.

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Notice And Consent
Illustration

[Print Forms to Leave Behind]

Step 3 : Submit Case

To complete the application process, click the "Submit" button to send your case to the Home Office.

[Submit]

Step 4 : Optional

Congratulations. Your application has been submitted! Your policy number is E9876543.
The following options are available :

[Print Application]   Click to print the entire signed application, including all disclosures and other supporting documents.

[Start New Case]   Click to start a new case.

[Return to Dashboard]   Click to access your other saved cases or log out of ExpertApp.

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