

Agent Portal

Guide

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Log-in to Agent Portal

Steps

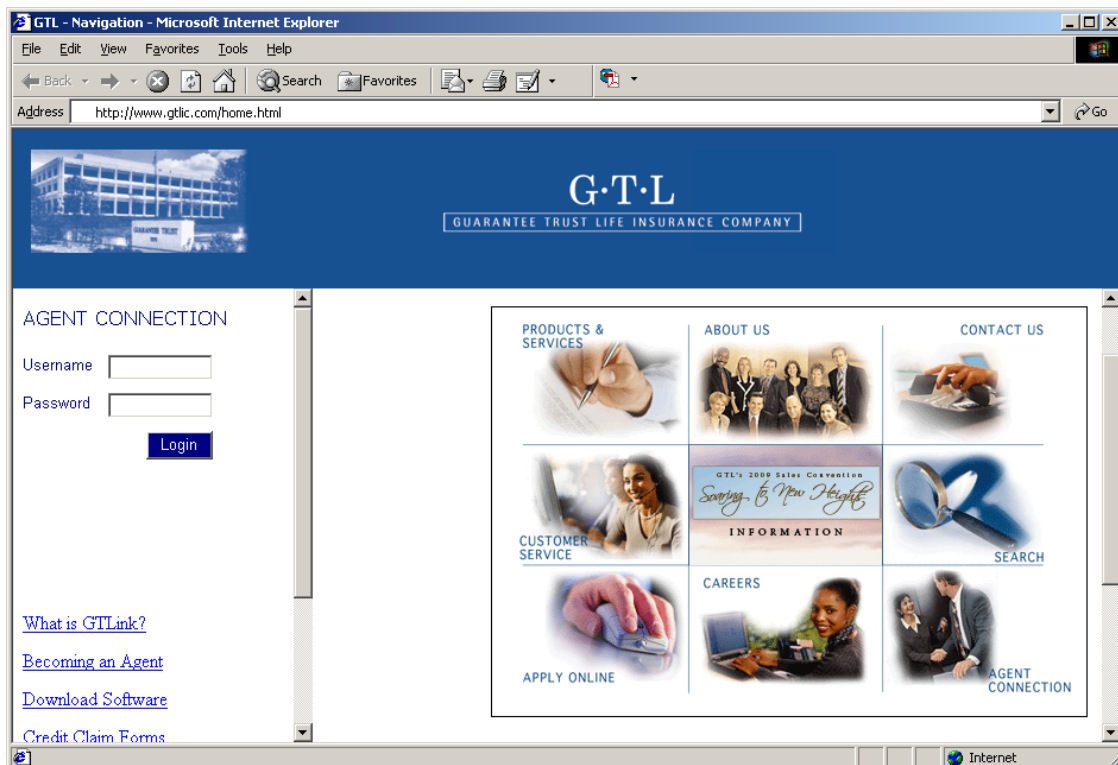
1. Go to <http://www.gtlic.com>.
2. Click Agent Connection on the left.
3. Type in your username and password.
4. Click Login.
5. If you are prompted to change your password:
 - a. Enter your current password along with a new password and then click Submit.
 - b. If your password changed successfully, click Continue, otherwise please go back and make sure the fields were entered correctly.
6. You should now see a link that reads "Agent Portal". Click Agent Portal. You are now at the Agent Portal home page.

Notes

- ◆ Your log-in session will be timed out after 20 minutes of inactivity and you will be asked to login again.

Screenshot

Login Screen



Get Quote

Steps

1. Click Quotes/Submit App link on the menu.
2. Select product and enter applicant information, then click Continue.
3. Select optional riders and enter coverage information, then click Continue.
4. You should now see the quote.

Notes

- ◆ In the face amount field, enter numbers only, special characters are not accepted. For example, enter 15000, in place of \$ 15,000.

Screenshot

Quote Screen

Submit Quote - Microsoft Internet Explorer

Address: <http://agentportal.gtlic.com/Quotes.aspx>

G.T.L. Agent Portal

Home | **Quotes/Submit App** | Search | Contact Us | PDF Applications

> Quotes/Submit App

AGENT PORTAL NEWS

Welcome to GTL's new Agent Portal

Questions?
Call (800) 323-6907
or
E-mail agency@gtlic.com

GTL's 2009 Sales Convention

Applicant Info

Product: --Select Product--	Issue Date: 10/24/2008
First Name: <input type="text"/>	Last Name: <input type="text"/>
Birth Date: <input type="text"/>	Age: <input type="text"/>
Gender: --Select Gender--	
Issue State: --Select State--	Under Writing Class: --Select UW Cl--

QUOTES/SUBMIT APP | SEARCH | CONTACT US | PDF APPLICATIONS

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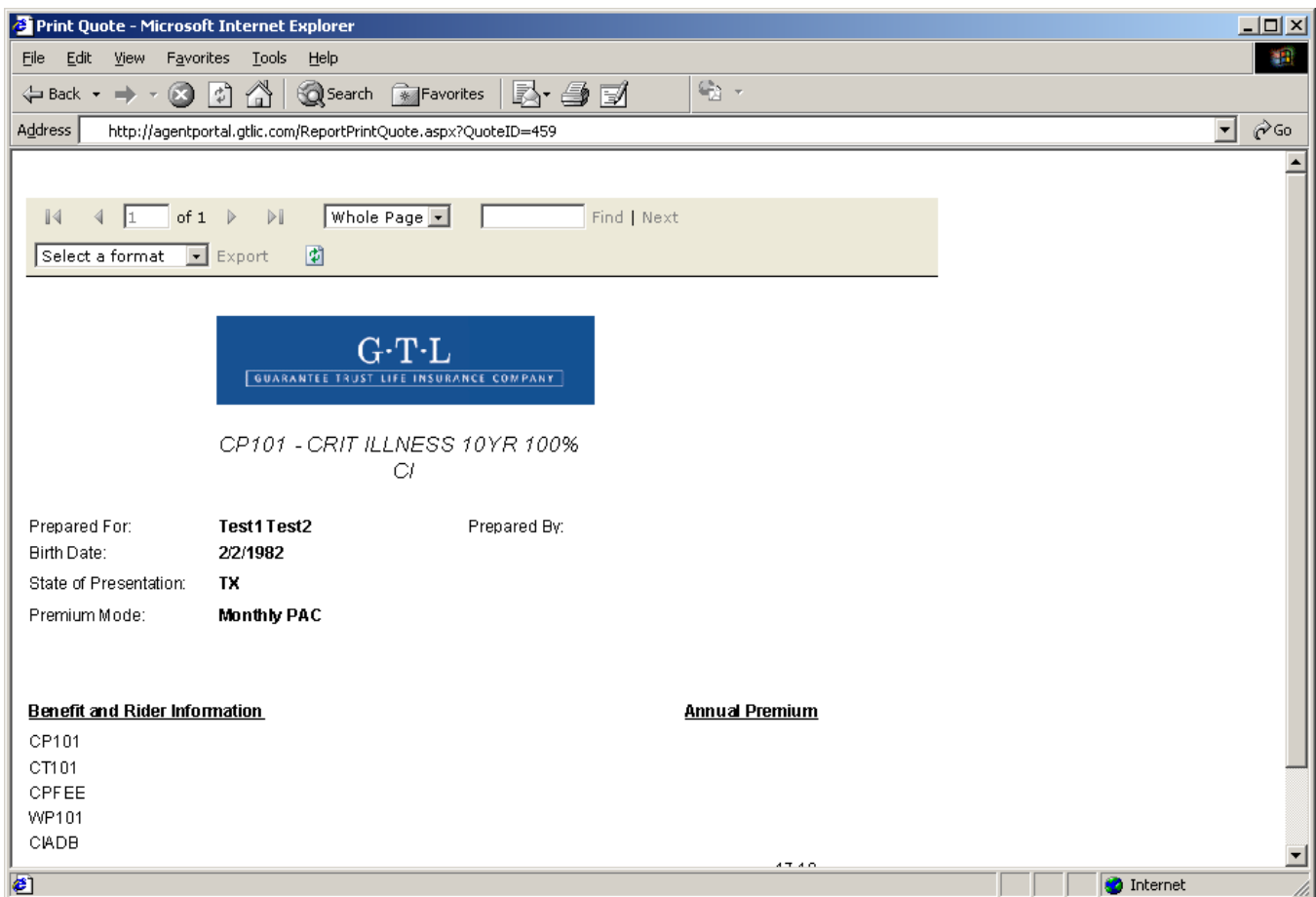
Print Quote

Steps

1. After getting a Quote you can print it.
2. Click the Print Quote button.
3. You should now see the Quote in a printable format.
4. Go to the File menu on your internet browser menu bar then Click Print.
5. Click the Back Button on your Internet Explorer bar to return to the Quote page.

Screenshot

Printable Quote



Save and Retrieve Quote

Steps

1. After getting a quote you can save it.
2. Click Save Quote. This will immediately save your quote.
3. To retrieve a saved quote, Click Search.
4. The quote you just saved should be the very first one on the list. If not, find the quote you just saved.
5. Click Edit under the details column for that row.
6. This will take you to the saved quote.

Screenshot

Search Screen – Click Edit to Complete a saved application.

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Search Criteria

Product Type: [None] First Name: Last Name:

Agent: Date Created (From): 09/24/2008 Date Created (To): 10/24/2008

[Search](#) [Reset](#)

You are viewing page 1 of 3

Product	Name	Date Created	Date Submitted	Status	Status Desc	Type	Details
CP101 - CRIT ILLNESS 10YR 100% CI	Test1 Test2	10/24/2008 10:31:50 AM				Q	Edit
CP101 - CRIT ILLNESS 10YR 100% CI	Debra Lynn	10/21/2008 2:33:11 PM	10/21/2008 2:38:00 PM	P	Incomplete	A	Edit
CP101 - CRIT ILLNESS 10YR 100% CI	Debra Lynn	10/21/2008 12:02:29 PM				A	Edit
CP101 - CRIT ILLNESS 10YR 100% CI	Debra Lynn	10/21/2008 11:28:36 AM	10/21/2008 11:34:00 AM	P	Incomplete	A	Edit

Fill Policy Application

Steps

1. After getting a quote, Click Fill Policy Application button.
2. Fill in all applicable fields, then click Save and Continue. You may click Verify Identity before filling out the entire page. Clicking Save and Continue will verify the applicant(s) before continuing.
3. You will come across coverage/premium questions, health questions, authorization, monthly premium payment plan, and more sections depending on the insurance product you selected. Fill in all fields, and then click Save and Continue for each of these sections.
4. Next, if you answered yes to the replacement insurance question, and if the state you chose has a Replacement Form, you will see that now. Fill in the form and then click Continue.
5. Depending on the state, you may see a Disclosure Form. If you do, fill in this form, and then click Continue.
6. You should now see a page titled "Consent to Electronic Transactions". Click the "I Accept" checkbox then click Submit.
7. You will see a thank you message along with the Policy Number.

Notes

- ◆ An applicant's identity can be verified up to 3 times. After the third try, the identity verification will continue to fail.
- ◆ In the address field do not type in the pound (#) sign. Instead, type in *No.* in place of it.

Screenshot

Policy Application Screen

G.T.L Agent Portal

Home Quotes/Submit App Search Contact Us PDF Applications

Product: CP101 - CRIT ILLNESS 10YR 100% CI Application Number: 518

Applicant(s) Information:

Last Name: First Name: M.I.:
 Birth Date:
 Social Security #: Sex: Age:
 Birth Place:
 Height: Ft. In. Weight:
 SSN Issue State:
 Occupation: Duties: Length of Current Employment:
 Effective Date:

Applicant (second) Information:

Last Name: First Name: M.I.:
 Birth Date:
 Social Security #: Sex: Age:
 Birth Place:
 Height: Ft. In. Weight:
 SSN Issue State:
 Occupation: Duties: Length of Current Employment:

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View and Print PDF

Steps

1. After submitting an application, a PDF is generated with the information from the application.
2. Click Search.
3. The very first row should be for the application you just submitted. If not, use the Search function to find the row for your application with a status of "S" for submitted.
4. Click View on that row.
5. The PDF should now come up on the screen.
6. Click the Printer icon on the Menu bar on top.
7. When the Print dialog box appears, click OK.

Screenshot

Search Screen – Click View to see a PDF

The screenshot shows the 'Search Quote or App' page in Microsoft Internet Explorer. The browser address bar shows 'http://agentportal.gtlc.com/Search.aspx'. The page features the GTL Agent Portal logo and a navigation menu with options: Home, Quotes/Submit App, Search, Contact Us, and PDF Applications. A sidebar on the left contains 'AGENT PORTAL NEWS' with a welcome message and contact information for the 2009 Sales Convention. The main content area is titled '> Search' and contains a 'Search Criteria' form with fields for Product Type (Application), Agent, First Name, Last Name, Date Created (From: 09/24/2008), and Date Created (To: 10/24/2008). Below the form are 'Search' and 'Reset' buttons. A table of results is displayed, showing the first page of 2 results. The table has columns for Product, Name, Date Created, Date Submitted, Status, Status Desc, Type, and Details.

Product	Name	Date Created	Date Submitted	Status	Status Desc	Type	Details
CP101 - CRIT ILLNESS 10YR 100% CI	Debra Lynn	10/21/2008 2:33:11 PM	10/24/2008 11:20:00 AM	S	Incomplete	A	View
CP101 - CRIT ILLNESS 10YR 100% CI	Debra Lynn	10/21/2008 12:02:29 PM				A	Edit
CP101 - CRIT ILLNESS 10YR 100% CI	Debra Lynn	10/21/2008 11:28:36 AM	10/21/2008 11:34:00 AM	P	Incomplete	A	Edit
CP101 - CRIT ILLNESS 10YR 100% CI	Debra Lynn	10/21/2008 11:03:06 AM	10/21/2008 11:16:00 AM	P	Incomplete	A	Edit

PDF Applications for Accident Coverage and Old CI

Steps

1. After logging in to the Agent Portal, you should see a menu on the top right for PDF Applications.
2. Under PDF Applications are two products listed, Critical Illness and Accident Coverage.
3. Clicking one of those links will take you to the Old Agent Portal's Verification Form.
 - a. For the Critical Illness product, only the following states require the PDF Applications: FL, ND, OR, UT, VA, WA. All other states will use the new Agent Portal.

Notes

- ◆ Applications submitted through here cannot be viewed after they are submitted.

Screenshot

PDF Application Menu

