

# Agent Portal

## Guide

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## Log in to Agent Portal

### Steps

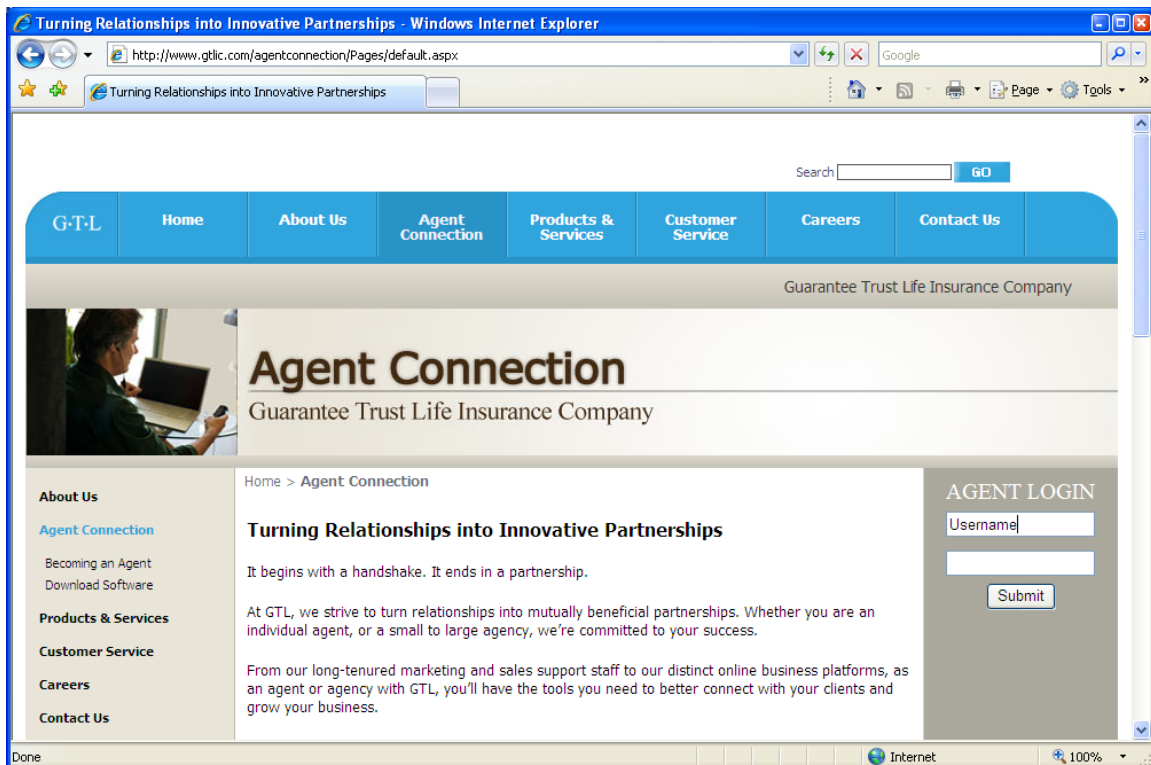
1. Go to <http://www.gtlic.com>.
2. Click Agent Connection on the top navigation or from the bottom right button.
3. Enter your username and password.
4. Click Login.
5. If you are prompted to change your password:
  - a. Enter your current password along with a new password and then click Submit.
  - 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 button that reads “Agent Portal”. Click Agent Portal. A new window will open. 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



## Obtain 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.
5. If you need to add a second applicant, please click the Add Second Applicant button and follow steps 1-4.

### Notes

- ◆ In the face amount field, enter numbers only, special characters are not accepted. For example, enter 15000, instead of \$15,000.
- ◆ Second applicant cannot be added for all products.

### Screenshot

Quote Screen

Submit Quote - Windows Internet Explorer  
https://agentportal.gtlic.com/Quotes.aspx

G-TL Agent Portal Welcome 011PRT00

HOME QUOTE/SUBMIT APP SEARCH CONTACT PDF APPS

Applicant Info

Product: --Select Product-- Issue Date: 06/04/2009

First Name: Last Name:

Birth Date: Age: Gender: --Select Gender--

Issue State: --Select State-- Under Writing Class: --Select UW Class--

Continue Reset

HOME QUOTE/SUBMIT APP SEARCH CONTACT PDF APPS

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## Print Quote

### Steps

1. After obtaining 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

The screenshot shows a Windows Internet Explorer browser window displaying a printable quote. The address bar shows the URL: https://agentportal.gtlic.com/ReportPrintQuote.aspx?QuoteID=4665. The page content includes the G.T.L. logo (Guarantee Trust Life Insurance Company) and the quote title: CP101 - CRIT ILLNESS 10YR 100% CI. Applicant information is listed: Prepared For: Applicant Name, Birth Date: 1/1/1961, State of Presentation: IL, Premium Mode: Monthly PAC. Prepared By: 011PRT00DEMONSTRATION AGENT. A table of benefits and riders is shown with an annual premium of 46.47. The date prepared is 6/4/2009 and it is page 1 of 1.

<u>Benefit and Rider Information</u>	<u>Annual Premium</u>
CP 101	
CT 101	
CP FEE	
WP 101	
CIADB	46.47

Date Prepared: 6/4/2009 Page 1 of 1

## Save and Retrieve Quote

### Steps

1. After obtaining 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; this will take you to the saved quote.

### Screenshot

Search Screen – Click Edit to complete a saved application.

The screenshot shows the G-TL Agent Portal search interface. The browser title is "Search Quote or App - Windows Internet Explorer" and the URL is "https://agentportal.gtlic.com/Search.aspx". The page has a blue header with "G-TL Agent Portal" and "Welcome 011PRT00". Below the header is a navigation menu with "HOME", "QUOTE/SUBMIT APP", "SEARCH", "CONTACT", and "PDF APPS". The search criteria section includes fields for Product Type (set to [None]), Agent (set to 011PRT00 - AGENT DEMONSTR), First Name, Last Name, Date Created (From) (set to 03/04/2009), and Date Created (To) (set to 06/04/2009). There are Search and Reset buttons. Below the search criteria, it says "You are viewing page 1 of 3" and "Grid Refreshed at: 3:41:28 PM". The table below shows the search results:

Product	Name	Date Created	Date Submitted	Status	Status Desc	Type	Details
CP101 - CRIT ILLNESS 10YR 100% CI	Applicant Name	6/4/2009 3:40:46 PM				Q	<a href="#">Edit</a>
CP101 - CRIT ILLNESS 10YR 100% CI	Test McGee	6/3/2009 4:28:15 PM				Q	<a href="#">Edit</a>
CP101 - CRIT ILLNESS 10YR 100% CI	Test McGee	6/3/2009 4:28:05 PM				Q	<a href="#">Edit</a>
CP101 - CRIT ILLNESS 10YR 100% CI	Test McGee	6/3/2009 4:28:01 PM				Q	<a href="#">Edit</a>
CP201 - CRIT ILLNESS 20YR 100% CI	Test McGee	5/27/2009 4:26:43 PM				Q	<a href="#">Edit</a>
CP101 - CRIT ILLNESS 10YR 100% CI	Test McGee	5/20/2009 4:17:33 PM				Q	<a href="#">Edit</a>
CP101 - CRIT ILLNESS 10YR 100% CI	jane smith	5/18/2009 2:40:44 PM				Q	<a href="#">Edit</a>
CP101 - CRIT ILLNESS 10YR 100% CI	john smith	5/18/2009 2:38:57 PM				Q	<a href="#">Edit</a>

## Fill Policy Application

### Steps

1. After obtaining a quote, click the Fill Policy Application button.
2. Complete all applicable fields, then click Save and Continue. You may click Verify Identity before completing 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. Complete 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. Complete the form and then click Continue.
5. Depending on the state, you may see a Disclosure Form. If you do, complete 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 three 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

## 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 appear 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 a Windows Internet Explorer browser. The page title is 'G-TL Agent Portal' and it says 'Welcome 011PRT00'. The navigation menu includes 'HOME', 'QUOTE/SUBMIT APP', 'SEARCH', 'CONTACT', and 'PDF APPS'. The 'SEARCH' section has the following criteria:

- Product Type: Application
- Agent: 011PRT00 - AGENT DEMONSTRAT...
- First Name: [Empty]
- Last Name: [Empty]
- Date Created (From): 03/04/2009
- Date Created (To): 06/04/2009

Buttons for 'Search' and 'Reset' are visible. Below the search criteria, a table displays the search results:

Product	Name	Date Created	Date Submitted	Status	Status Desc	Type	Details
CP101 - CRIT ILLNESS 10YR 100% CI	Test Test	5/6/2009 4:16:40 PM	5/6/2009 4:22:00 PM	T	Incomplete	A	<a href="#">View</a>
CP101 - CRIT ILLNESS 10YR 100% CI	Test App	5/6/2009 2:11:10 PM	5/6/2009 2:15:00 PM	T	Incomplete	A	<a href="#">View</a>
CP201 - CRIT ILLNESS 20YR 100% CI	TOM JONES	4/30/2009 4:58:36 PM	4/30/2009 5:02:00 PM	P	Incomplete	A	<a href="#">View</a>

## 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

