

Introducing the new Lincoln Life Insurance eSubmission Portal

Exploring the new life eTicket and *MoneyGuard*® eApp platform

On Feb. 12, 2024, Lincoln launched a new user experience for producers who submit electronic life tickets and *MoneyGuard*® applications from the Lincoln producer website. The new **eSubmission Portal** is available on Lincoln’s producer website for Life eTicket and *MoneyGuard* eApp cases.

What you need to know

The new Lincoln in-house eSubmission Portal includes:

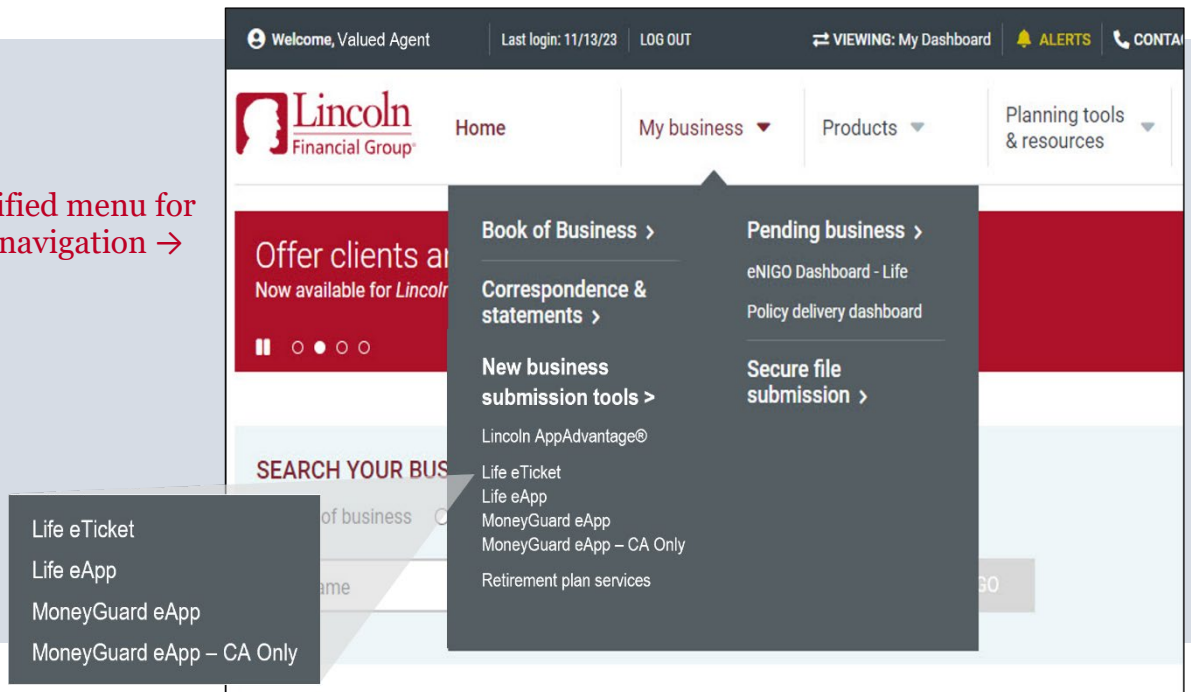
1. **Life eTicket:** electronic ticket completed with basic client information to start the application process. The client will be required to complete a personal history interview, online or over the phone for Term and Permanent products.
2. ***MoneyGuard* eApp:** the traditional *MoneyGuard* life insurance application, completed online. The client will be required to complete a personal history interview, online or over the phone.

The new portal utilizes the same process and questions that you are accustomed to, with an updated look and feel that is an extension of Lincoln’s producer website experience.

Getting Started: My business

From Lincoln’s producer website, quickly navigate to the preferred submission method from the simplified drop-down menu. Choose Life eTicket, Life eApp, *MoneyGuard* eApp, or *MoneyGuard* eApp – CA Only to be automatically directed to the eSubmission Portal.

Simplified menu for quick navigation →



NOTE: Lincoln’s eSubmission Portal is not currently available for Life eApp or MoneyGuard Market Advantage® cases in CA; cases will continue to be routed through iPipeline until further notice. All electronic capabilities are subject to availability based on product, firm and/or state approvals. Electronic submission is not available for MoneyGuard® II in California.

Getting started:

New Business submission tools

Or, visit the New Business submission tools landing page to learn more about the various application methods and navigate to the eSubmission Portal.

The screenshot shows the Lincoln Financial Group website's 'New Business submission tools' landing page. The page is designed for financial professionals and includes a navigation menu with options like 'My business', 'Products', and 'Planning tools & resources'. The main content area is titled 'New Business submission tools' and features several key sections: 'Lincoln AppAdvantage®' for expediting fixed annuity business, 'LIFE & MONEYGUARD' for secure and user-friendly application processes, 'Life eTicket Submission' for basic client information, 'Life eApp Submission' for traditional life insurance applications, 'MoneyGuard® eApp Submission' for traditional life insurance applications, and 'RETIREMENT PLAN SERVICES' for RFP processes. A 'Contact us' button is prominently displayed on the right side of the page.

eSubmission Portal

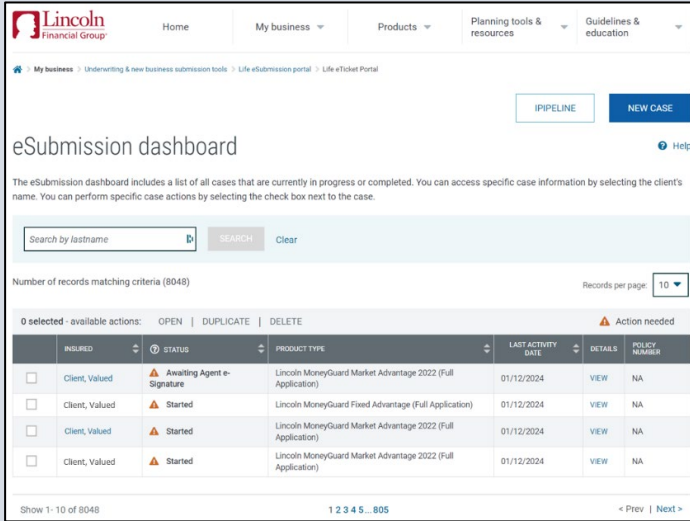
For Financial Professionals who submit business electronically through the Lincoln Producer Website, the new eSubmission Portal provides an end-to-end digital experience for the agent. Users can start an application, collect signatures, track pending and completed applications, manage outstanding requirements, and close their cases all within the Lincoln Producer website.

The screenshot shows the Lincoln eSubmission portal landing page. The page is designed for financial professionals and includes a navigation menu with options like 'Home', 'My business', 'Products', 'Planning tools & resources', and 'Guidelines & education'. The main content area is titled 'Welcome to the Lincoln eSubmission portal' and features a welcome message, 'WHAT TO EXPECT' section, and 'ADDITIONAL INFORMATION' section. The 'WHAT TO EXPECT' section includes points such as 'You can save your progress and come back to complete at a later time' and 'After 40 minutes of inactivity you will be logged out'. The 'ADDITIONAL INFORMATION' section includes points such as 'Start new case' will allow you to create a new ticket or application and 'View my dashboard' will allow you to access the dashboard to view pending and submitted policies. A 'START NEW CASE' button is prominently displayed at the bottom of the page.

ePortal Landing page

- ✓ User friendly design
- ✓ Helpful introductory information and instructional sections
- ✓ Access to "Start New Case" or "View Dashboard"

eSubmission Portal



Open Cases in iPipeline as of Feb. 12, 2024

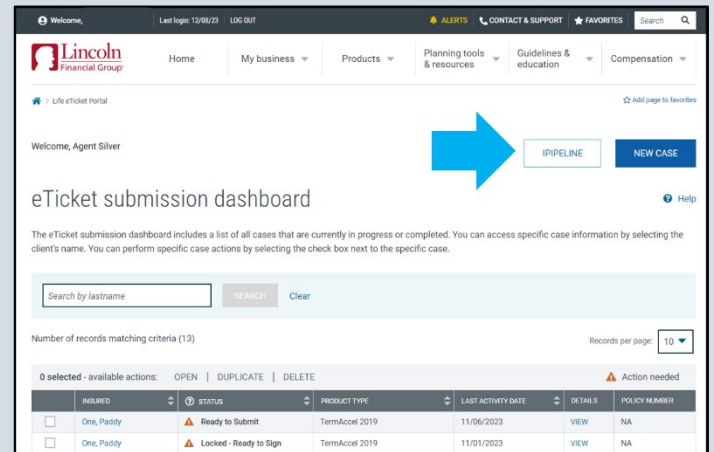
After Feb. 12, 2024, new Life eTicket and *MoneyGuard* eApp cases can only be submitted through the Lincoln eSubmission Portal. However, producers will continue to have access to iPipeline through mid-April 2024 to submit open cases to Lincoln.

An iPipeline link will be available on the eSubmission Portal Dashboard which will allow you to quickly navigate to iPipeline.

Any open cases not submitted in iPipeline after mid-April 2024 must be resubmitted through the Lincoln eSubmission Portal.

ePortal Dashboard

- ✓ Real-time updates on cases in progress
- ✓ Enhanced tracking tools throughout the signing process
- ✓ Resend, cancel, create eSignature packets, and more!



Frequently Asked Questions

Do I need to create a new ID and login to access these tools?

No, the Lincoln eSubmission Portal and Dashboard are accessible with your current login for the Lincoln Producer Website.

What platform are my life eTicket and *MoneyGuard*® cases submitted through today?

Currently, producers are redirected from Lincoln's producer website to iPipeline for electronic submission. Starting on Feb. 12, 2024, all life eTickets and *MoneyGuard* eApps that are accessed through Lincoln's website will use the Lincoln eSubmission portal. At this time, *MoneyGuard Market Advantage*® cases in CA will continue to be routed through iPipeline.

My agency/firm currently leverages iPipeline directly for submission, can I still use that account?

Yes. For partners that have a direct account with iPipeline, there will be NO CHANGE in that experience. Producers will continue to log in directly to iPipeline for all life and *MoneyGuard* electronic submissions to Lincoln.

Resources

Click - [Life eTicket Agent Training](#)

Click - [MoneyGuard eApp Agent Training](#)

Life insurance issued by The Lincoln National Life Insurance Company, Fort Wayne, IN and distributed by Lincoln Financial Distributors, Inc., a broker-dealer. Contractual obligations are backed by the claims-paying ability of the issuing insurance company. The Lincoln National Life Insurance Company does not solicit business in the state of New York, nor is it authorized to do so. Lincoln Financial Group is the marketing name of Lincoln National Corporation and its affiliates. Only Registered Representatives can sell variable products.