Pending Website Delegate User Update

Transactional access now available for delegate users

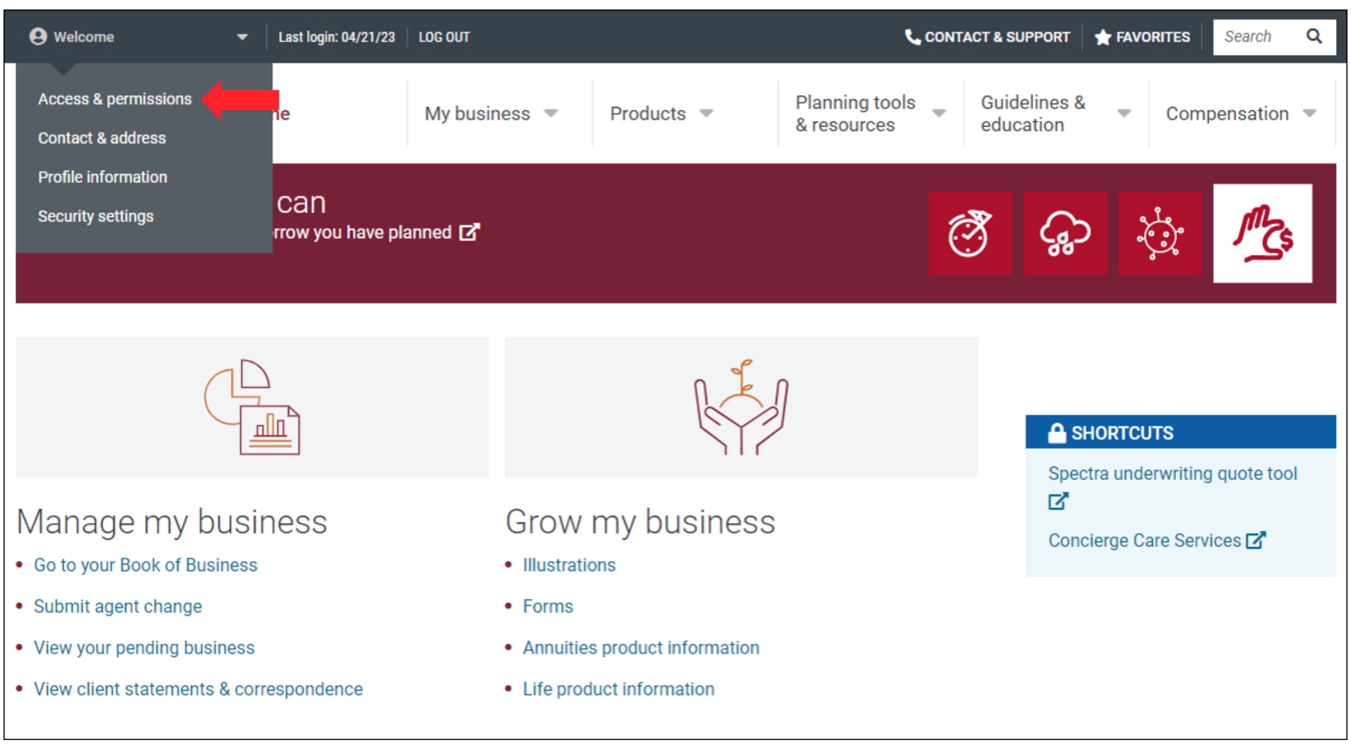
Lincoln is excited to announce expanded access for delegate users of the pending website to include the ability to perform New Business transactions. In the past, a delegated access user had “View Only” or “Read Only” capabilities which prevented the user from using many of the digital capabilities offered on the pending website. Now, delegates who are granted “transactional access” will have the same capabilities on the pending website as the Broker-dealer or Financial Advisor who provided them access.

Delegates with transactional access will now be able to utilize the following pending website functionalities:

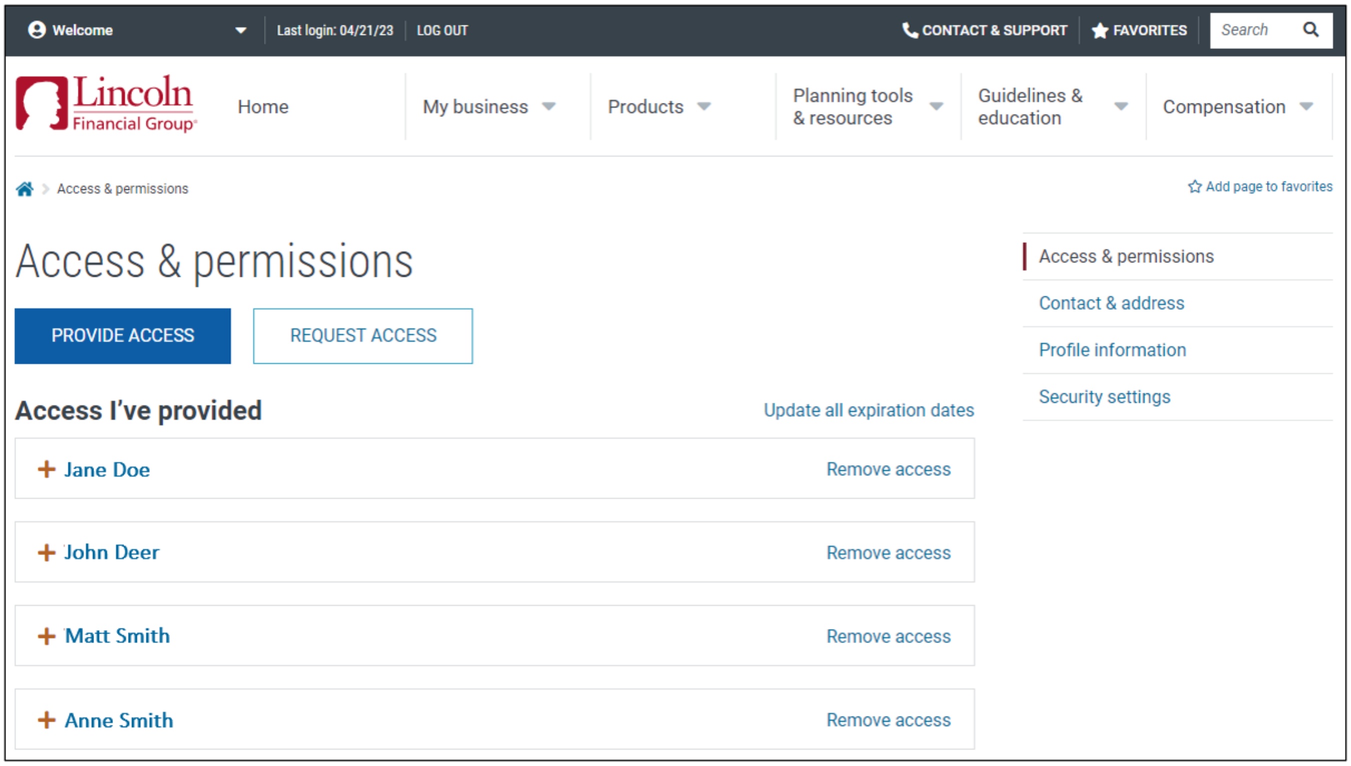
- eNIGO: Leverages eSignature to electronically satisfy not-in-good-order form requirements
- Two-way Communication: Satisfy outstanding questions and/or requirements online
- Click-to-Chat: Chat online with a New Business Contact about your case
- Send emails to your New Business Contact
- Upload and send files

Instructions for granting delegate permissions from the pending website:

After logging in, under the welcome dropdown in the top left corner, select “access and permissions.”

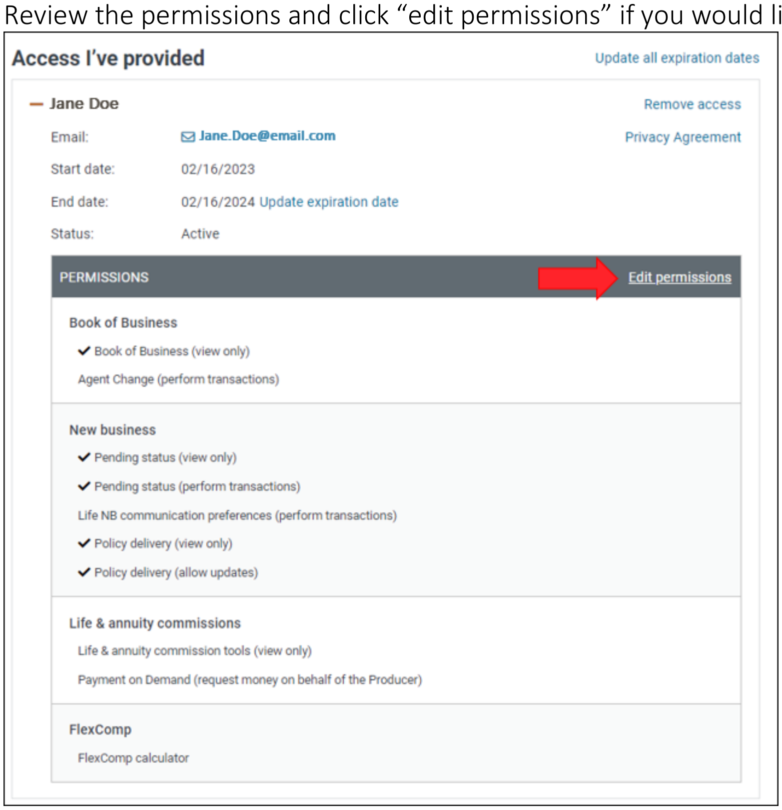


Here you will see the option to provide or request access, as well as view the access you have provided to others, if applicable.



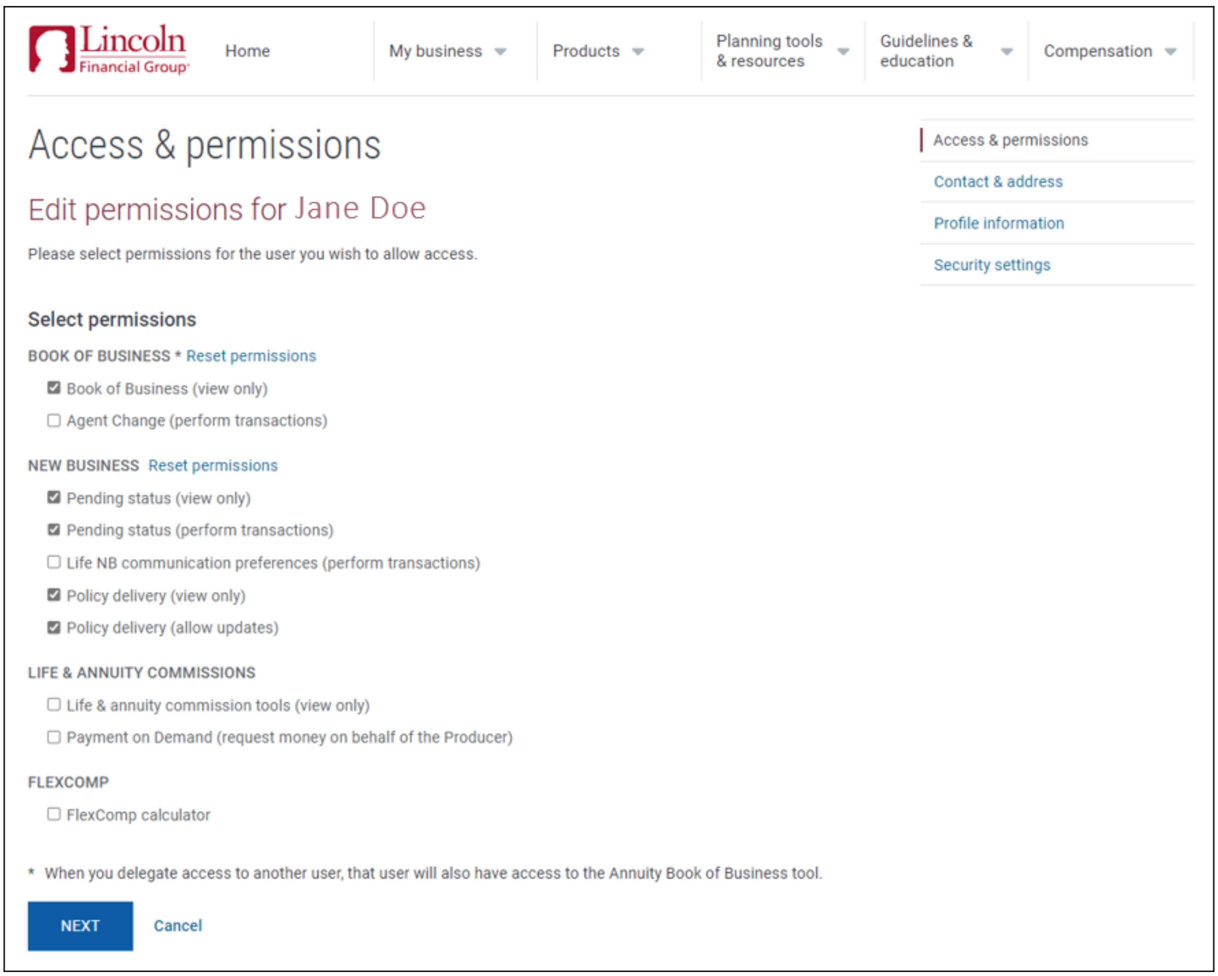
To update delegate access:

- Expand the delegate profile by clicking the "+" next to their name
- Review the permissions and click "edit permissions" if you would like to make updates



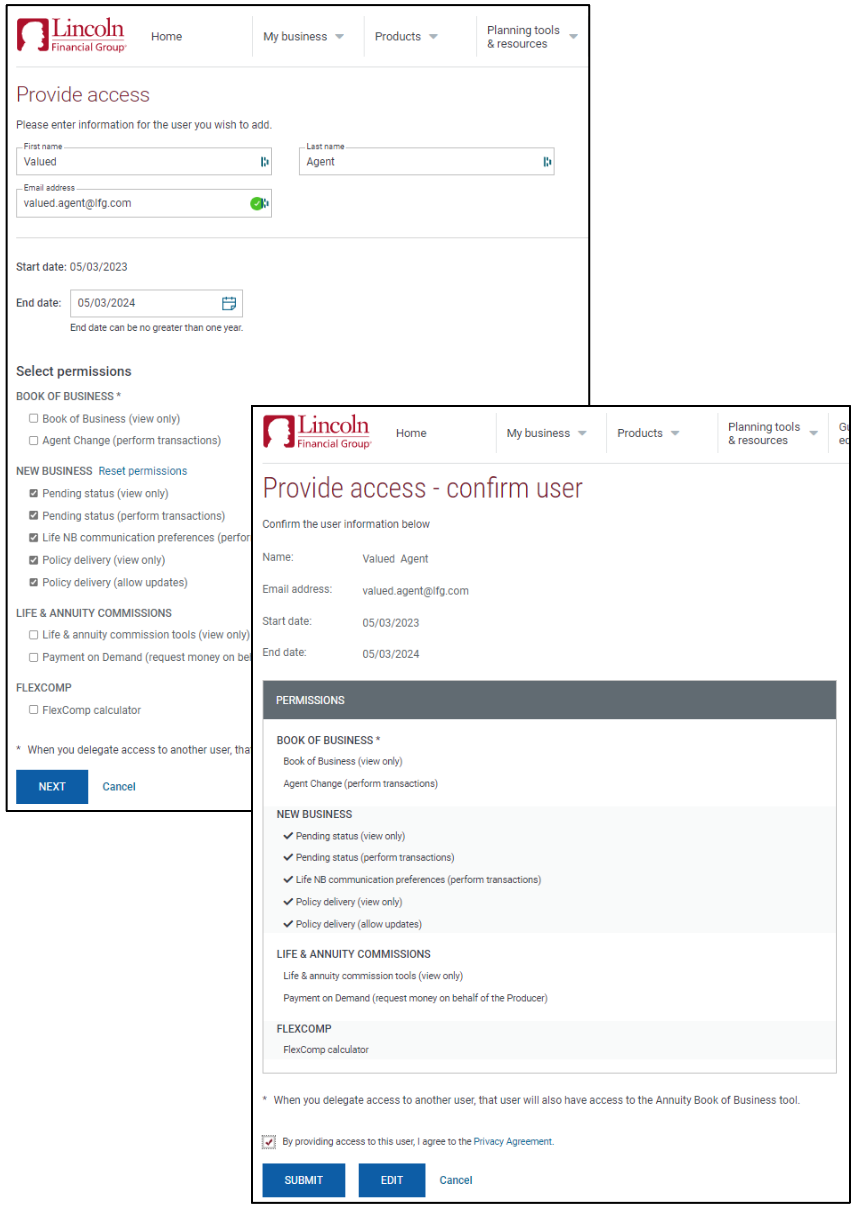
- ACTION: Select desired permissions
    - Pending Status (View Only)
        - View pending cases and their information
    - Pending Status (Perform Transactions)
        - Perform actions on pending cases withing the pending tool, such as initiating eNIGO, replying to free-response questions, etc.
    - Life NB Communication Preferences (Perform Transactions)
        - Update preferences for receiving communications from Life Underwriting & New Business
    - Policy Delivery (View Only)
        - View information on policy delivery dashboard, including policy PDF
    - Policy Delivery (Allow Updates)
        - Resend the DocuSign link and change the email address that the link is sent to
        - Request a change and cancel the DocuSign envelope

- Review and submit



To add a new delegate:

- Click “provide access”
- Enter user information
- Select desired permissions
- Review and submit



When you add a new delegate, or update a delegate’s access, they will receive an email confirming their access.

For more information about delegates and the pending website, please review the following training materials:
[Pending Tools – Agent Training Brainshark]
[Pending Case Enhancement Overview]