

# Pending Website Delegate User Update

Transactional access now available for delegate users

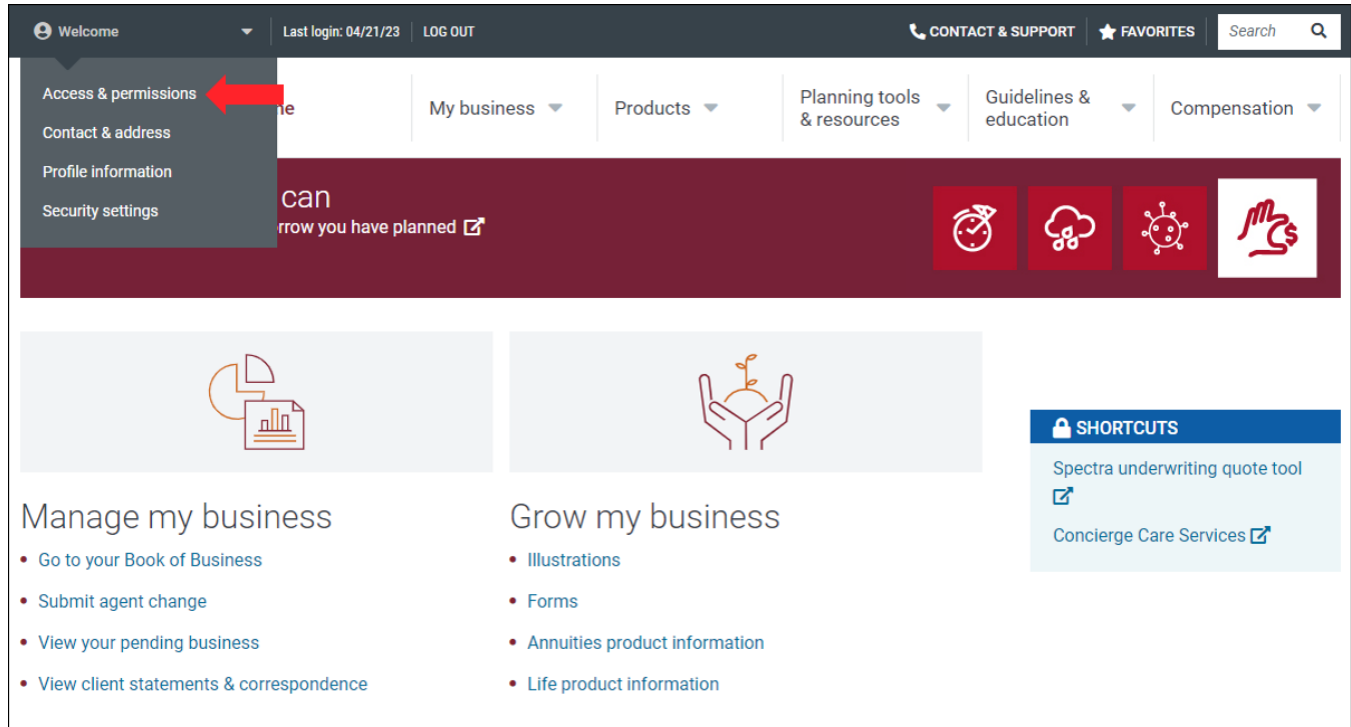
Lincoln is excited to announce expanded access for delegate users of the pending website to include the ability to perform New Business transactions. In the past, a delegated access user had “View Only” or “Read Only” capabilities which prevented the user from using many of the digital capabilities offered 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.”



The screenshot displays the user interface of the pending website. At the top, there is a navigation bar with a 'Welcome' dropdown menu, 'Last login: 04/21/23', and 'LOG OUT'. On the right side of the navigation bar, there are links for 'CONTACT & SUPPORT', 'FAVORITES', and a search bar. Below the navigation bar, there are several menu items: 'Access & permissions' (highlighted with a red arrow), 'My business', 'Products', 'Planning tools & resources', 'Guidelines & education', and 'Compensation'. The main content area features a dark red banner with the text 'can grow you have planned' and several icons. Below the banner, there are two main sections: 'Manage my business' and 'Grow my business'. The 'Manage my business' section includes links for 'Go to your Book of Business', 'Submit agent change', 'View your pending business', and 'View client statements & correspondence'. The 'Grow my business' section includes links for 'Illustrations', 'Forms', 'Annuities product information', and 'Life product information'. On the right side, there is a 'SHORTCUTS' section with links for 'Spectra underwriting quote tool' and 'Concierge Care Services'.

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

Welcome | Last login: 04/21/23 | LOG OUT | CONTACT & SUPPORT | FAVORITES | Search

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Access & permissions | Add page to favorites

## Access & permissions

PROVIDE ACCESS | REQUEST ACCESS

### Access I've provided

Update all expiration dates

- + Jane Doe | Remove access
- + John Deer | Remove access
- + Matt Smith | Remove access
- + Anne Smith | Remove access

Access & permissions | Contact & address | Profile information | Security settings

### 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

### Access I've provided

Update all expiration dates

- Jane Doe | Remove access

Email: Jane.Doe@email.com | Privacy Agreement

Start date: 02/16/2023

End date: 02/16/2024 | Update expiration date

Status: Active

PERMISSIONS | Edit permissions

**Book of Business**

- ✓ Book of Business (view only)
- Agent Change (perform transactions)

**New business**

- ✓ Pending status (view only)
- ✓ Pending status (perform transactions)
- Life NB communication preferences (perform transactions)
- ✓ Policy delivery (view only)
- ✓ Policy delivery (allow updates)

**Life & annuity commissions**

- Life & annuity commission tools (view only)
- Payment on Demand (request money on behalf of the Producer)

**FlexComp**

- FlexComp calculator

- **ACTION: Select desired permissions**
  - Pending Status (View Only)
    - View pending cases and their information
  - Pending Status (Perform Transactions)
    - Perform actions on pending cases with 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

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## Access & permissions

### Edit permissions for Jane Doe

Please select permissions for the user you wish to allow access.

- Access & permissions
- Contact & address
- Profile information
- Security settings

#### Select permissions

**BOOK OF BUSINESS \* Reset permissions**

- Book of Business (view only)
- Agent Change (perform transactions)

**NEW BUSINESS Reset permissions**

- Pending status (view only)
- Pending status (perform transactions)
- Life NB communication preferences (perform transactions)
- Policy delivery (view only)
- Policy delivery (allow updates)

**LIFE & ANNUITY COMMISSIONS**

- Life & annuity commission tools (view only)
- Payment on Demand (request money on behalf of the Producer)

**FLEXCOMP**

- FlexComp calculator

\* When you delegate access to another user, that user will also have access to the Annuity Book of Business tool.

**NEXT** Cancel

To add a new delegate:

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

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### Provide access

Please enter information for the user you wish to add.

First name: Valued Last name: Agent

Email address: valued.agent@ifg.com

Start date: 05/03/2023

End date: 05/03/2024

Select permissions

BOOK OF BUSINESS \*

NEW BUSINESS [Reset permissions](#)

LIFE & ANNUITY COMMISSIONS

FLEXCOMP

\* When you delegate access to another user, that user will also have access to the Annuity Book of Business tool.

NEXT Cancel

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### Provide access - confirm user

Confirm the user information below

Name: Valued Agent

Email address: valued.agent@ifg.com

Start date: 05/03/2023

End date: 05/03/2024

PERMISSIONS

BOOK OF BUSINESS \*

NEW BUSINESS

LIFE & ANNUITY COMMISSIONS

FLEXCOMP

\* When you delegate access to another user, that user will also have access to the Annuity Book of Business tool.

By providing access to this user, I agree to the Privacy Agreement.

SUBMIT EDIT Cancel

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](#)

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