

Navigating Your Producer Website Series

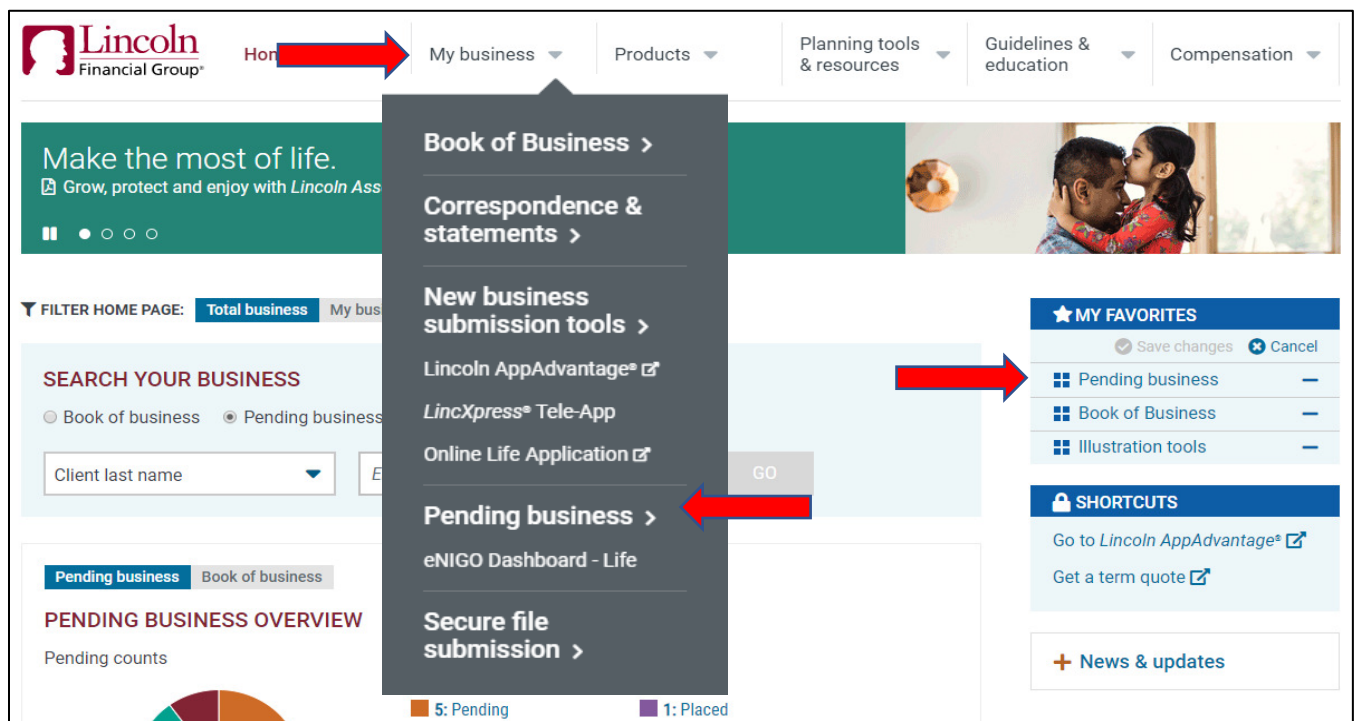
Part 1: Search Options

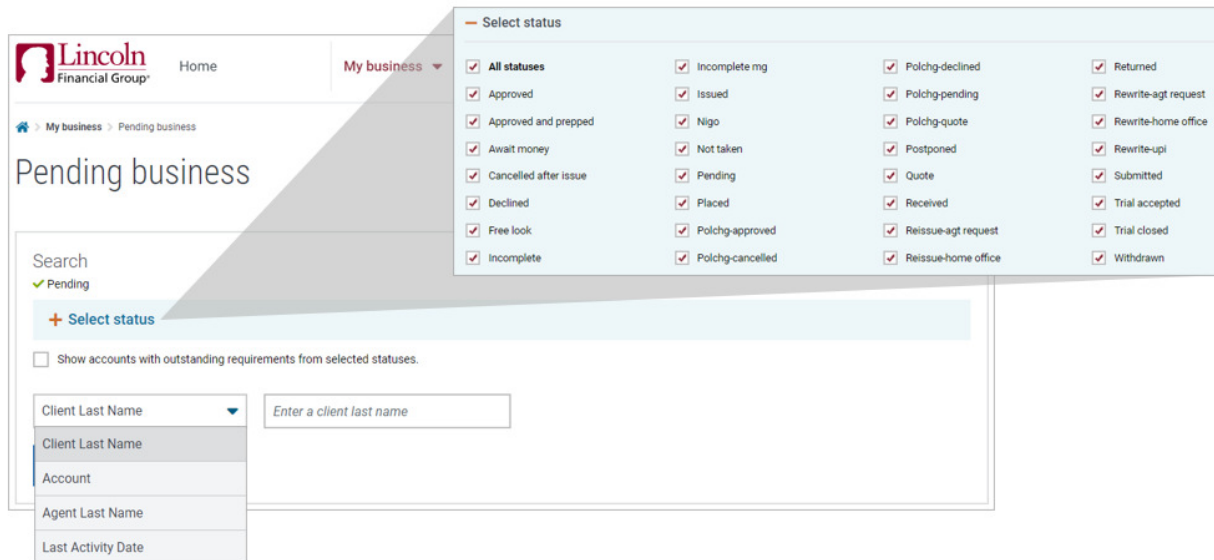
Once your case is received by Lincoln, how do you determine what is needed to complete underwriting, issuing and placing the case in force? Our pending case status tools, located on the Lincoln producer website, are designed to help you more efficiently manage your business and reduce turnaround times. This series of job aids will provide a quick reference on how to locate your pending cases, navigate the requirements and cross the finish line to policy placement.

How Do I Access the Pending Business Website?

There are 3 ways to access your pending business.

1. After logging in to your Lincoln Producer account, navigate to the “My Business” tab and select “Pending Business”.
2. Select “View your pending business” under Manage my Business.
3. Access from the Favorites icon in the top right.



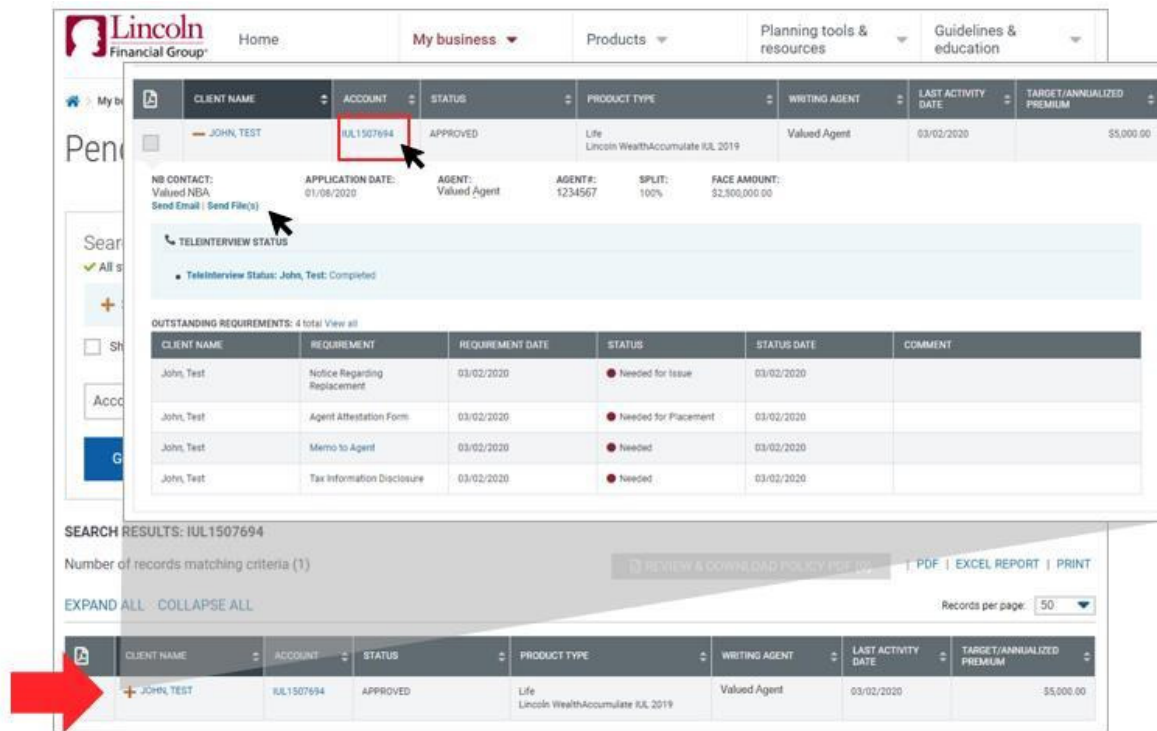


Pending Business Search Options

Once you are in Pending Business, clicking the “+ Select Status” link will open a pop-up window with your customizable search options. Or you can utilize the Search drop down utilizing Client Last Name, Agent Last Name or Last Activity Date.

Pending Search Case Overview

Within the Pending Case Search you will have access to a Snapshot of multiple cases and the ability to expand each case to view requirements. To access complete case details, you would click the policy number in the Account column.



Please contact your dedicated Lincoln Underwriting & New Business team with any questions.

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