

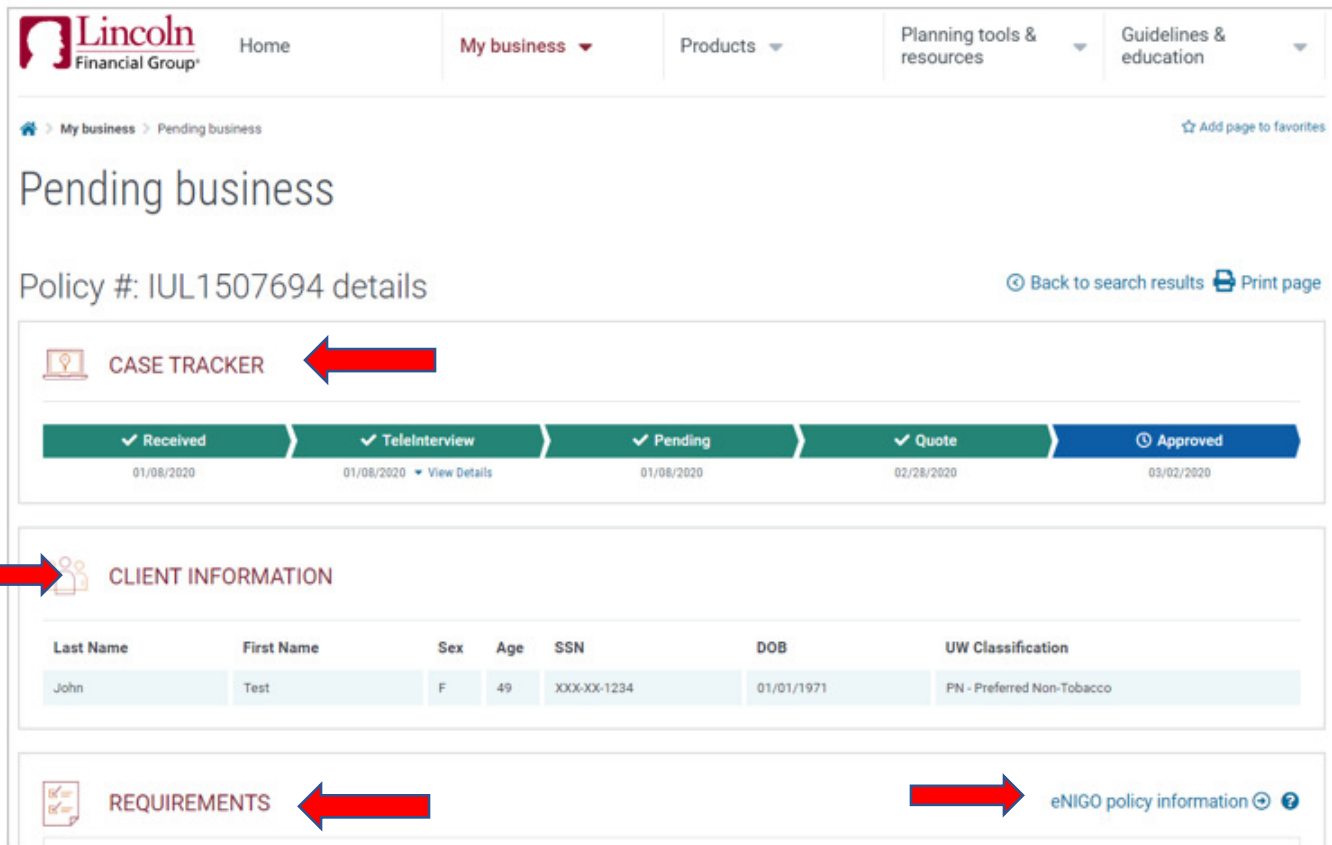
# Navigating Your Producer Website Series

## Part 2: Pending Details-Case Tracker and Client Info

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 placement.

### Pending Details

Once you have clicked on the policy number, you can view the pending case details where you will have access to the case tracker, client information, outstanding requirements, eNIGO and online communication tools.



The screenshot displays the Lincoln Financial Group producer website interface. At the top, there is a navigation menu with links for Home, My business, Products, Planning tools & resources, and Guidelines & education. Below the menu, the breadcrumb trail shows "My business > Pending business". The main heading is "Pending business".

The specific case details are for Policy #: IUL1507694. A progress bar shows the case status: Received (01/08/2020), TeleInterview (01/08/2020), Pending (01/08/2020), Quote (02/28/2020), and Approved (03/02/2020). A red arrow points to the "CASE TRACKER" section.

The "CLIENT INFORMATION" section contains a table with the following data:

Last Name	First Name	Sex	Age	SSN	DOB	UW Classification
John	Test	F	49	XXX-XX-1234	01/01/1971	PN - Preferred Non-Tobacco

A red arrow points to the "CLIENT INFORMATION" section. Below this, the "REQUIREMENTS" section is visible, with a red arrow pointing to it. To the right of the Requirements section, there is a link for "eNIGO policy information".

## Case Tracker

The Case Tracker provides a high-level snapshot of your case status along with key dates. In addition, if your client will be completing their application using the Phone Interview or eInterview you can expand/and or collapse the details on the interview status beneath the Interview chevron.

**CASE TRACKER**

✓ Received 01/08/2020    ✓ TeleInterview 01/08/2020    ✓ Pending 01/08/2020    ✓ Quote 02/28/2020    ⌚ Approved 03/02/2020

CLIENT NAME: JOHN, TEST

— TeleInterview status: Completed

STATUS DATE	STATUS	SCHEDULED DATE
01/08/2020	Teleinterview needed	
01/08/2020	Interview initiated	
01/08/2020	Interview completed	

## Client Information

The Client information page will have general information for your client, including Name, Sex, Age, last 4 digits of SSN and DOB.

**Client information**

Last Name	First Name	Sex	Age	SSN	DOB
John	Test	F	49	XXX-XX-1234	01/01/1971

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

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