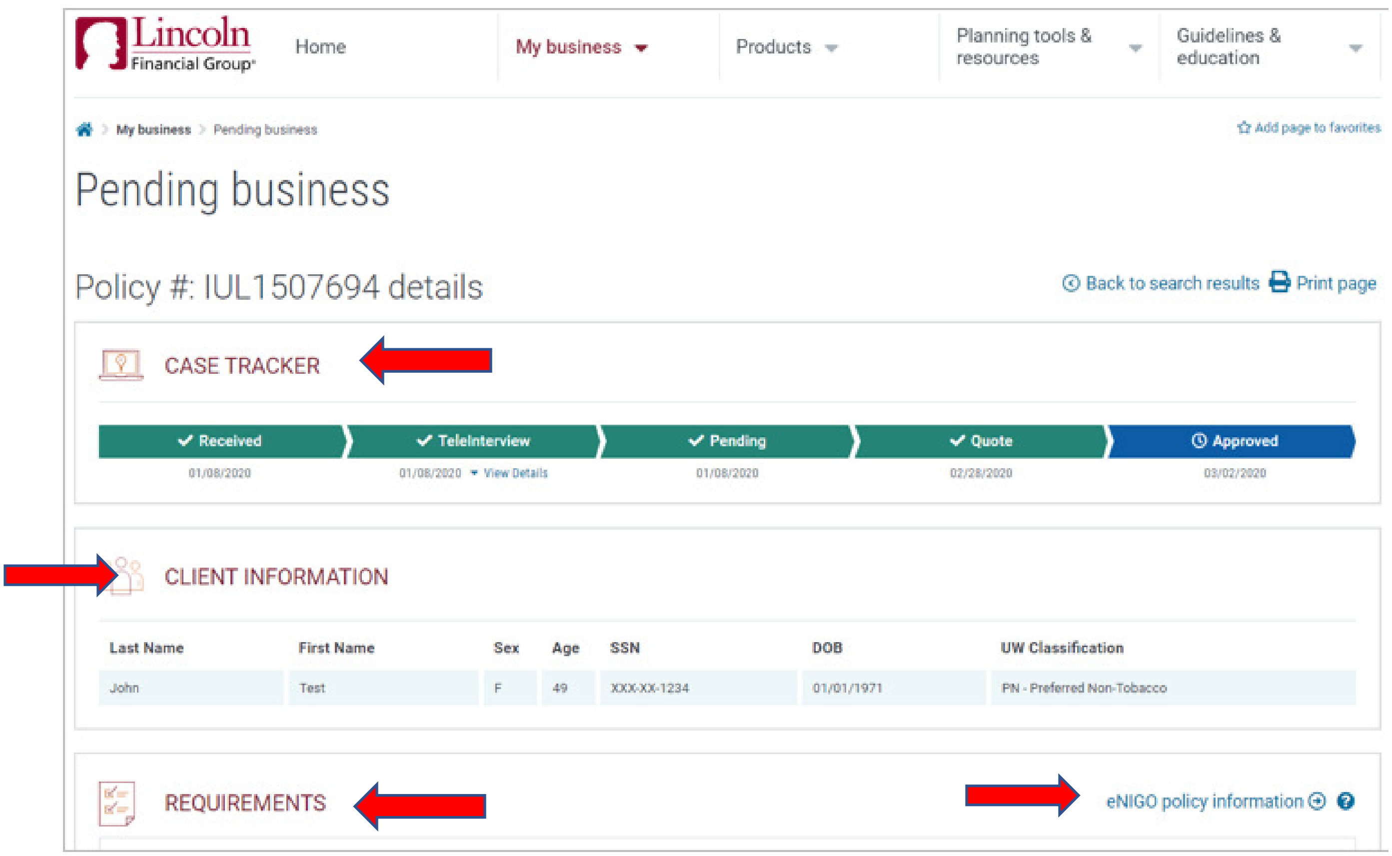
Navigating Your Producer Website Series

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.

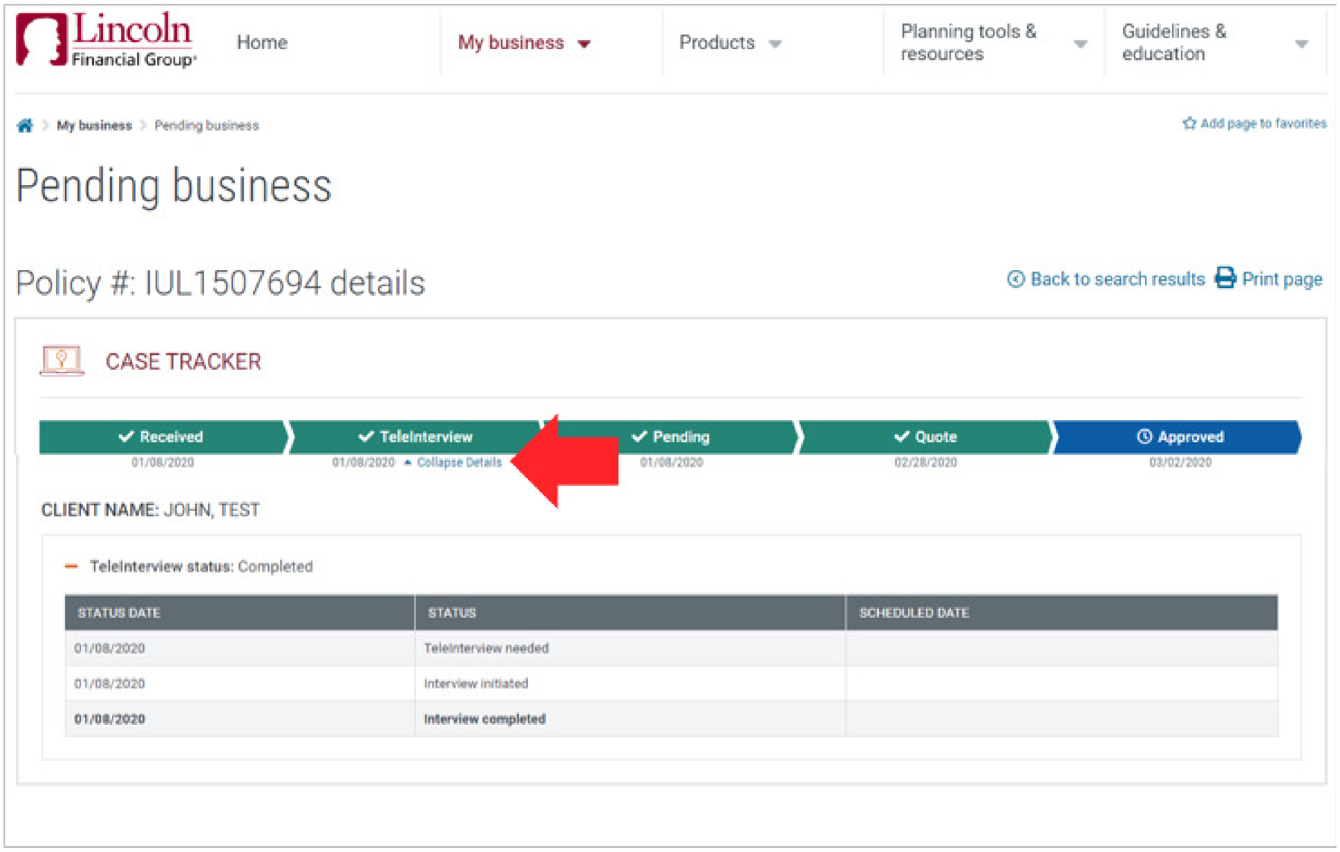
Pending Details

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.



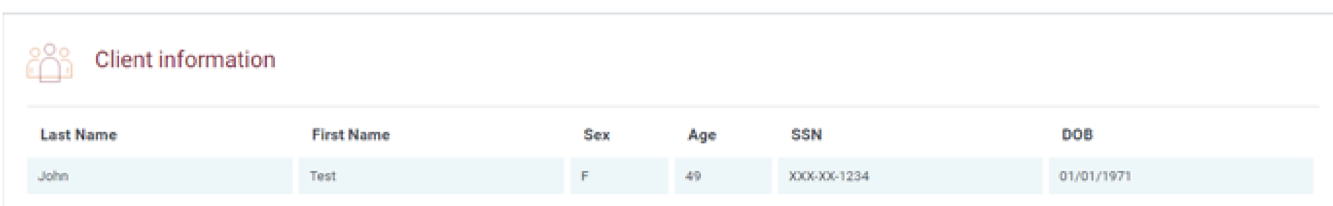
Case Tracker

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.



Client Information

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



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