

eApp Portal Login – Go To www.insuranceapplication.com/CALLCENTER

(First time users will need to complete a brief self-registration by clicking 'New User or Password Reset' and completing the requested fields.)

****NOTE****One of the items necessary for registration is a 'Call Center ID'. You **must** enter the number '600' that was provided to your agency and included in your agent welcome e-mail.

New eApps – Once logged in, click the 'New Application' button to begin a new eApp and follow the application completion screens while providing all necessary information.

Quoting – The quoting platform built into the eApp system is fully customizable by face or premium amount. Note that there is also a quick way to get a quote without having to start a new case. See below, and go to www.insuranceapplication.com/PHONEQUOTE

Billing – No monies are transacted until applications are approved by the carrier. All C.I. apps are processed within 3-5 business days on average and can go in effect any day 1st-28th of the month, and can be paid via EFT or Credit/Debit Card (VISA & MC Only). Questions? Contact CBS 1-888-455-7462 – e-mail: info@cbsinsurance.net

Signatures – As a convenience to both agents & clients alike, the eApp system presents 3 signature methods to choose from. Below are short descriptions of each:

- ✉ **Email for Signature** - This option sends an email to all individuals who need to sign the application. The e-mail includes a link to access a secure website to review and electronically sign the application. The individual signing the app will enter the last 4 digits of their SSN to verify their identity and gain access to E-sign the application. Agents can track the signatures from the 'App Que' page on www.insuranceapplication.com/callcenter, and they must go there after all signatures are captured to click the final 'Submit' button that uploads the app for processing.
- ✉ **Voice Signature** – Agents will utilize their own recording tool and record a short carrier approved verification script with the client. Thereafter, agents will upload a copy of the audio file which will transmit the data to the carrier and satisfy the signature requirement. From there, the agent will return to the 'App Que' via www.insuranceapplication.com/callcenter and they will click the final 'Submit' button that uploads the new case to the underwriters.
- ✉ **Sign on Screen** - Allows the client to review the application and sign on the screen. This is compatible with any mobile device/tablet (using a stylus or finger) or a mouse on a computer. This signature method can also be used via screen sharing where controls can be handed over to the client. Once the E-signatures are applied agents will return to the 'App Que' via www.insuranceapplication.com/callcenter to complete the new app by clicking the 'Submit' button.

(**Remember to **ALWAYS** go back to the 'App Que' to click the final 'Submit to Home Office' button that transmits the application to the carrier for processing...**)

Congratulations! This Completes the New Enrollment!
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Quoting W/Out Starting a New Case (Quick Quotes!) – ****Please Note**** The following tool provides basic quotes that solve for a desired benefit (face) or premium amount, but this is **ONLY** for fast quotes and **DOES NOT** continue or redirect to the E-App submission portal. Go to -www.insuranceapplication.com/PHONEQUOTE - enter your agent number, select product, and click 'Continue to Quote'