

NOTE Anytime errors are found on applications that have already been signed and submitted for processing, agents can send a quick e-mail to – underwriting@aatx.com to request changes.

Login for Agent Back Office -

1. Go To: www.occidentallife.com & Login under ‘**Agent**’ using the newly issued Agent Writing Number. (First time users will enter the last 4 digits of their SSN or Tax ID as the Default Password. Thereafter, you will be prompted to create a new password.)

Once logged in, you’ll find a menu of selections that include a number of tools, reports, etc.

The ‘**Agent e-File**’ contains all information needed to track your business; it includes your Client List and any outstanding requirements, current and prior year Production Report, Daily and Weekly Activity Reports, Scoreboard, Advance information and much more.

♦ **Pending Business Overview**

If there are ever any questions on submitted business, an underwriter will send the agent an e-mail that includes a clickable link. The e-mail link sent by the underwriters directs the agent to a memo that specifies the additional information being requested for the app, and where to send that back. Although these e-mails are sent to agents as a convenience, it is recommended that agents also get in the habit of regularly logging into their ‘**Agent E-File**’ and checking the ‘**Correspondence**’ page to see if any pending cases require additional information.

From the **Correspondence** page, click the ‘**View**’ button to access a memo that details the additional requirements an app may need before the policy can issue. **These reports are vital to your business**, because they provide detailed instructions on what an agent needs to do or provide in order for apps to continue processing.

****NOTE**** **BUSINESS IS WITHDRAWN AFTER 30 DAYS** if agents fail to complete the pending requirements laid out by the memos they receive from underwriters when additional information is needed on an app.

New business underwriting extensions can be granted upon request depending on the unique circumstances. Contact the carrier’s underwriting department for details.

**CHECK YOUR ‘AGENT e-FILE’ OFTEN TO STAY ON TOP OF
YOUR BUSINESS!!!**