

benefitexpress Case Status for HealthAmericaOnesm

BE Case Status	What It Means	What's the Next Step?	How to Get There	Notes
Quoting	You are acquiring, or have acquired, the basic information necessary to create a proposal with illustrative rates and may or may not have sent the proposal to the prospect.	You and the applicant choose a product of interest and collect the medical information necessary for the underwriting process.	Click the "Enroll" link at the top of the case screen. First "Enroll" (choose) a product to submit, then "Enroll" the case (collect the medical history data).	Organize your cases by month—you can create folders for this—and label them using Last name, First name and Zip Code.
Enrolling	You are choosing a product and/or collecting the health history data and banking information necessary for the underwriting process.	The agent reviews the case prior to submitting it for medical underwriting.	Click the "Agent Review" link at the top of the case screen.	If your applicant enters all the data themselves, it's an Internet enrollment. If you collect an application and enter the data yourself, it's a Paper enrollment. For Bank Account Numbers: Include any leading "0's".
Agent Review	All information has been collected and verified by the applicant and/or the agent. The agent can now review and submit the application for underwriting.	The agent submits the application for underwriting	Click the "Submit" link and follow the prompts. For Internet enrollment: send a signed Trust Agreement. For Paper enrollment: send copy of cover page, signed signature page (from app) and a signed Trust agreement.	Click the "Verification" button at the Enroll screen to scroll through the collected information.
Pending Underwriting	Case has been submitted and is waiting in queue for underwriting.	The agent receives underwritten ("final") rates for the case	Underwriting reviews the case, updates the rates and case status.	Complete and accurate information makes the underwriting process go much faster.
Agent Final Review	Case has been underwritten and "final" rates are available to share with applicant(s). Click "Agent Final Review" link for a given case to see "final" rates. Convey the rates to the applicant and get a written acceptance.	Sell the case by clicking the "Continue" button at the bottom of the page. DO NOT do this until you have a written acceptance for the rates and effective date from the applicant		"Final" rates are available for other products if the customer requests. Return to the Products page to deselect the current and reselect new products.
Approved	Case is sold—Congratulations! The applicant(s) information will now load into HealthAmerica's system, ID cards and member materials will generate.	On to the next case!		Please contact your wholesaler IMMEDIATELY if a case is "Approved" (sold) by accident or with incorrect information.