LifeShield
NATIONAL INSURANCE CO

Agent Portal Guide

Step By Step Instructions To Help Better Your Business Efforts

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**For additional help with the agent portal, contact LifeShield Agent Services – (833)989-0033**

SEND AN AGENT APPOINTMENT INVITATION (E-Contract)

Use this form to invite a potential LifeShield Agent to go through the E-Contract process. This form will send the Agent an email with a unique link to complete the contracting.

On left side of your screen, put your mouse on the open-door icon, **Invitations & Authorizations** will come up, then select "**Send Invitation".**
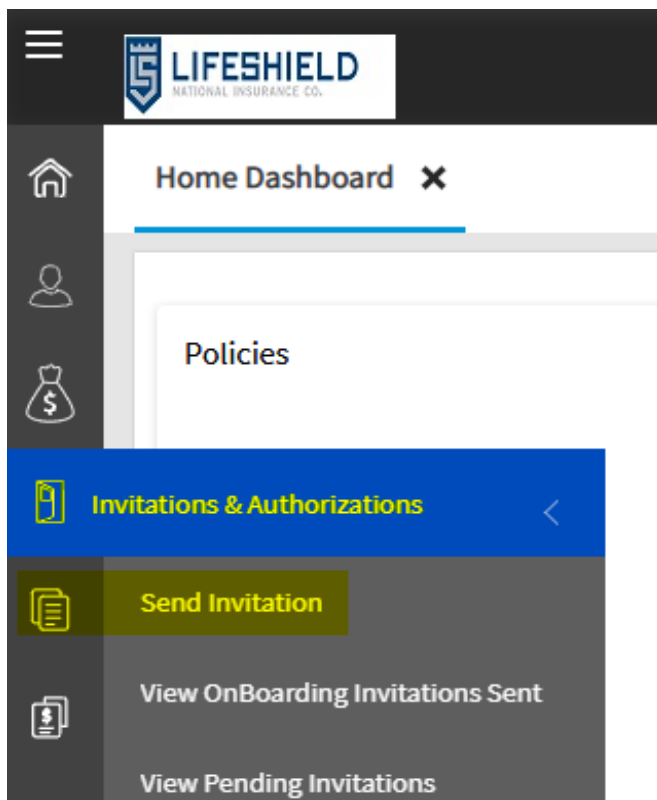
Do you want to invite an agent/agency? From the drop-down box select either "**Agent"** or "**Agency"**

Does the new agent/agency directly report to you? From the drop-down box select either "**Yes**" or "**No**"

Please answer questions below for sending invitation.

Do you want to invite an agent/agency? *	Select ▼
Does the new agent/agency directly report to you? *	Select ▼

Select
No
Yes

If you select **"No"** another box will pop up asking for the RA (Recruiting Agent) Name, click on the magnifying glass.

Please answer questions below for sending invitation.

Do you want to invite an agent/agency? *	Agent ▼
Does the new agent/agency directly report to you? *	No ▼
RA Name	🔍

You can search by either "**Agent Name**" or "**Agent Number**" by clicking in the preferred box and typing in the Agent Name or Agent number, then click on the blue Search box.

Agent Name		Agent Number	

Search

When the agent's name is displayed, click the blue circle, then the green "Use" box. This will take you back to the main screen. Your RA (Recruiting Agent) name should now appear in the RA Name box.

Click "**Continue"** at the bottom of the screen.

The **Channel**, **Contract Name**, **Carrier Name** and **RA Level** (Recruiting Agent's level) will auto fill. Under **Agent Level**, select the Level to be assigned to the agent being invited. Then fill in the agent's information. Under **RA Hierarchy,** you **must** select the number that is in the drop-down list. It will correspond to the RA's Agent Number with LifeShield National Insurance Co. Under **Payee**, select whether the payment will be made to the "**Agent**" or the "**RA**". Under **Advancing Allowed**, select "**Yes"** if the agent is approved for Advancing, "**No"** if the agent is not approved for Advancing:

Send Invitation

Channel	Sales	RA Level	99
Contract Name	LSN Contract	Agent Level	Select
Carriers	LifeShield National	First Name	
Last Name		SSN	
NPN		RA Hierarchy	
Commission Paid To	Select	Advancing Allowed	Select

Click "**Continue**".

Type in the agent's email address. The fields in the **Email Subject** and **Email Body** will auto-populate with the names:

Send Invitation

Click **"Finish"**

The agent will receive the email with a unique link to complete the Onboarding/Contracting process.

NOTE: When sending the invitation, it is important that you do not modify the field highlighted below.

[ClickHere]

If this field is modified or deleted, the agent will not receive the link to complete the Onboarding/Contracting process.
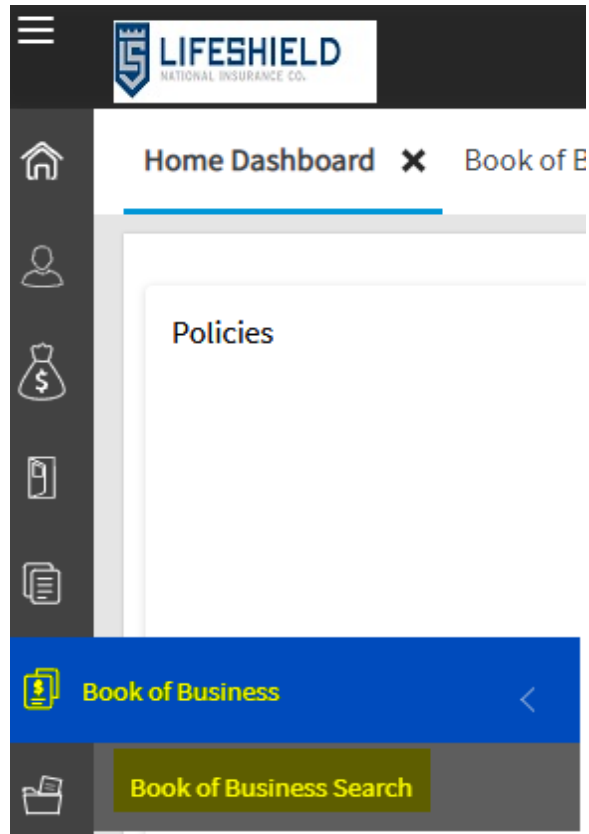
BOOK OF BUSINESS

View Policyholder information:

On left side of your screen, put your mouse on the paper with the $. **Book of Business** will come up and from there select "**Book of Business Search".**

Once your **Book of Business** has loaded (depending on how you want your Book of Business) you can click on Policy# and it will sort it by policy number or insured name and it will sort alphabetically.

Click "**View More"** to view additional information.

Saved Views	Book of Business Search						Advanced Search ⌄
Producer Name	**Producer Code**	**Policy #**	**Insured Name ↑**	**State**	**Plan**	**Issue Class**	
■	■	■	■	OH	LNIC 1st to Die Whole Life - Male NS	UW	VIEW MORE

If you want to look for a certain policy number, insured, etc., you can do an advance search by clicking on **Advance Search** in the upper right-hand corner. Then fill in the box that applies to what you want to search and click on the blue search box.

You can also export your **Book of Business** to a .CSV or Excel file by clicking on the XLS drop down arrow.
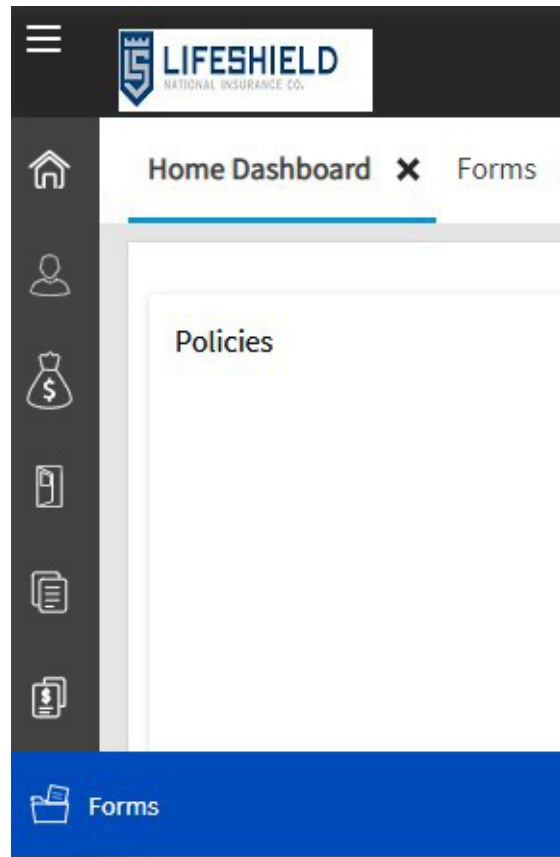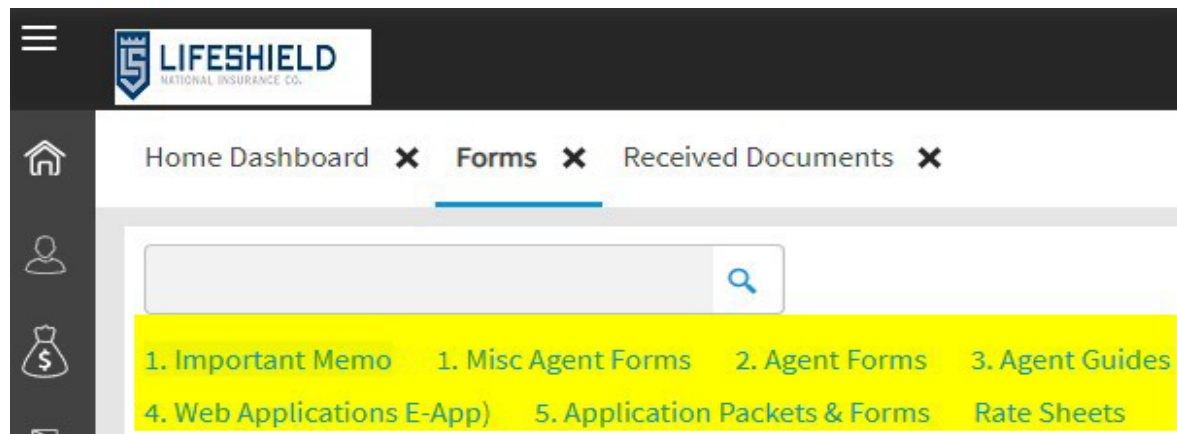
E-App or Download PDF App

On the left side of your screen, put your mouse over the file folder icon and click on **"Forms".**

After you click on **Forms**, you can choose which category you need.

For the link to the E-App:

Click on 4. "Web Applications E-App". It will list each state (Example: AL E-APP) with the link directing you to the E-App.

Home Dashboard ✕   Forms ✕

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1. Important Memo   1. Misc Agent Forms   2. Agent Forms   3. Agent Guides   **4. Web Applications E-App)**

4. Web Applications E-App)   5. Application Packets & Forms   Rate Sheets   **4. Web Applications E-App)**

AL E-App

LSNeapp.com/AL

For more information regarding our E-App process, click on Web Applications E-App, under E- App Processing, click on the link and it will pull up a help guide for the e-app.

Home Dashboard ✕   Forms ✕

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1. Important Memo   1. Misc Agent Forms   2. Agent Forms   3. Agent Guides   **4. Web Applications E-App)**

4. Web Applications E-App)   5. Application Packets & Forms   Rate Sheets   **4. Web Applications E-App)**

E-App Processing Instructions

LifeShield Survivor eApp Agent Guide V.2.pdf

For a PDF of the Application:

In the **Forms** pane, click on "5. Application Packets & Forms", it will list each state. Under each state abbreviation is a link to the application pdf. Click on the link. The pdf file will open, and you can print the application.
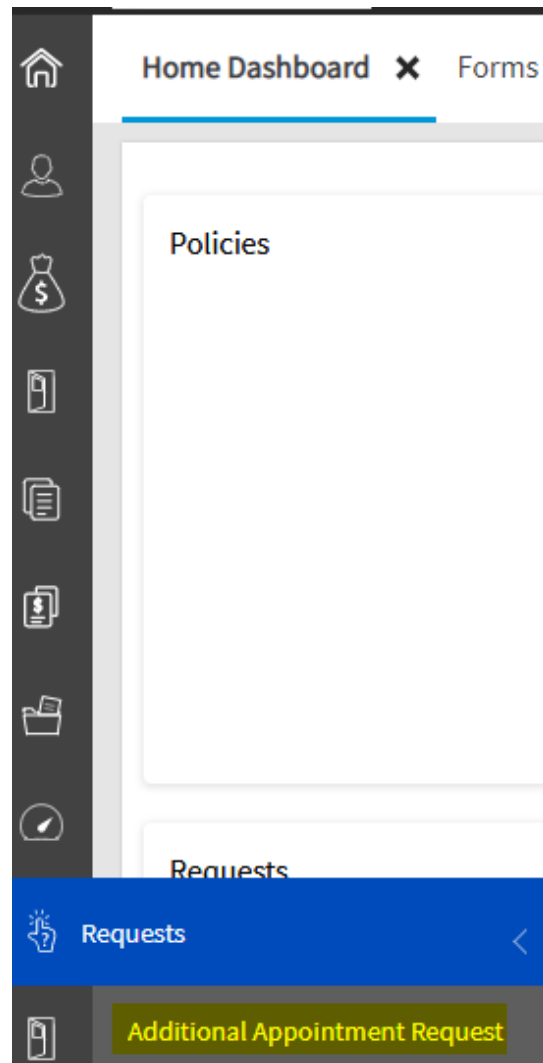
To Request Additional Appointments

On the left side of your screen put your mouse over the hand and the request box will come up. Click on **Additional Appointment Request**.
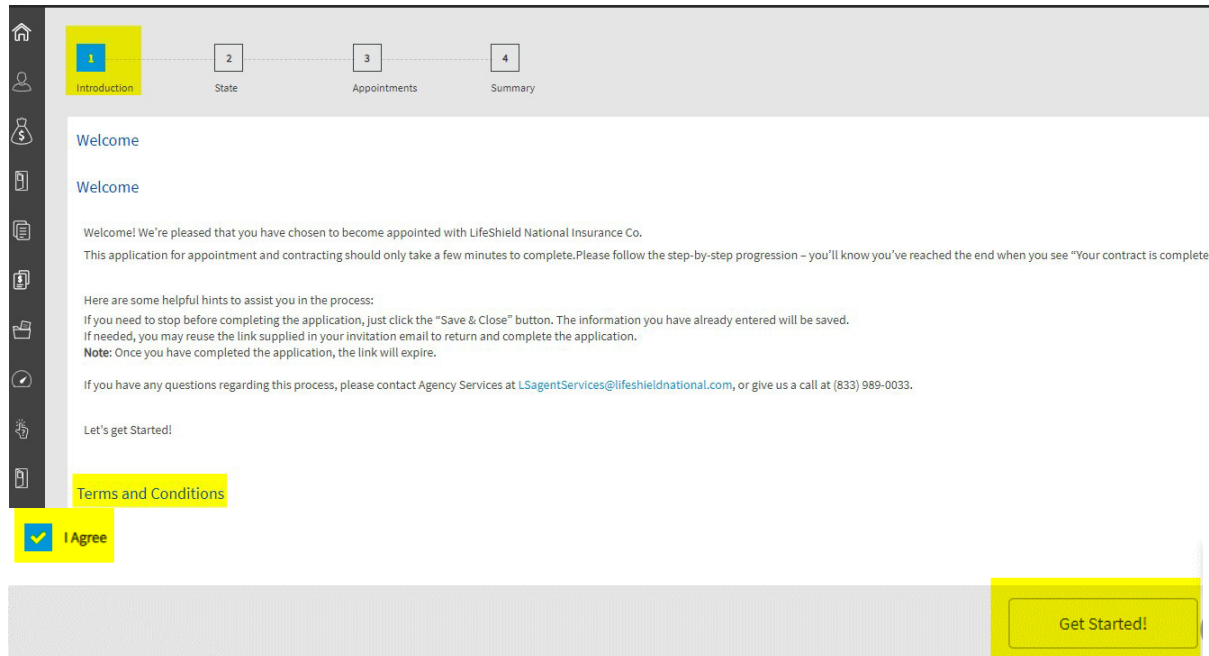
Once the window opens to the Introduction page, you will need to read the **Terms and Conditions.** At the bottom of page, you will click on the box that says **I Agree** then click Get Started!

The next screen will be the **State** screen. This screen lists all your state licenses. If you would like to view more information about your license, click on the View More option on the right side of the screen.
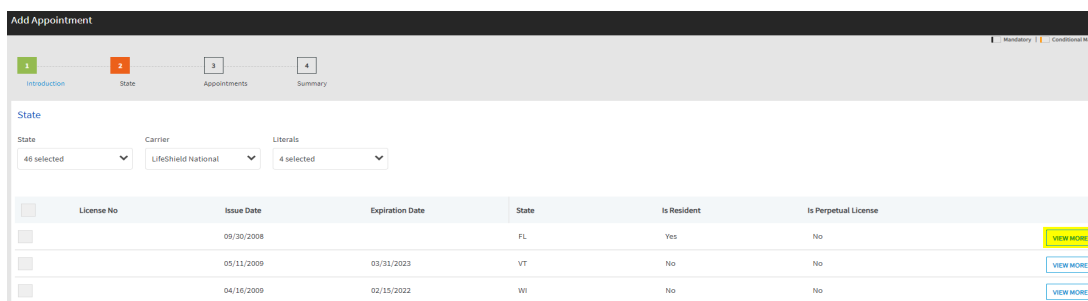
If you don't want to view more information, then just go to the bottom and click next. This will take you to the appointments screen.
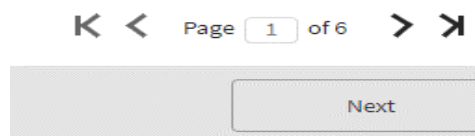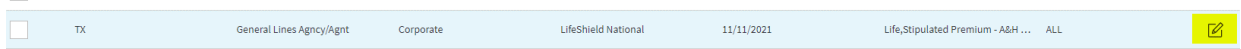
On the **Appointments** screen, find the state you want to get the appointment in and click on the paper with the pencil on the right side of the screen.


This will cause the LOA and the county box to have drop down arrows. Click the drop-down arrow for the LOA and choose Life. Click on the drop-down arrow for the county and make sure the **"All"** box is checked.

After you chose the LOA and County, you will need to click **Save** on the right side next to the county box.
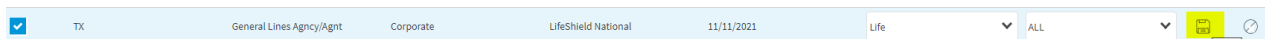
After you have saved your changes, click on the box next to the state abbreviation on the left side of your screen, then click on the bottom right of your screen.
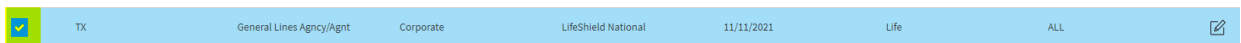
On the **Summary** screen it will show what appointments you are requesting, review the Information to make sure everything is correct and click **Save and Submit.**

It will say **Saved Successfully**, click **OK**

Saved Successfully

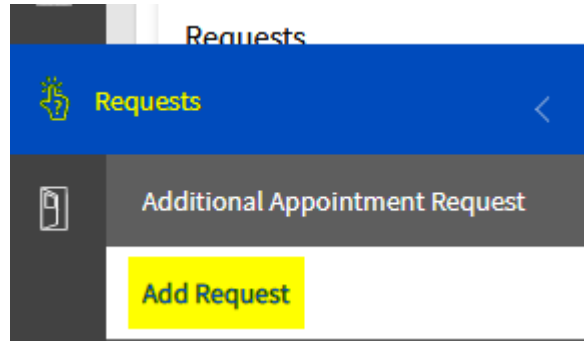Your application is submitted successfully and will be forwarded to the appropriate user for approval.

Ok

TO SUBMIT REQUESTS (i.e. Order Supplies, Submit Paper Apps, Bank Changes, etc.)

Click on **Request**, then click on **Add Request**

Select **Request Type** using the drop-down arrow.

For example, to order paper app kits, select **Order Supplies**. This will bring up a box, complete the required fields, then click save.

Submitting An Application

While in **Add Request**, select **Submit Application** form the **Request Type** drop-down menu. Complete the requested information in the **Description** box and use the **Add New Document** link to attach the application.

When you click Add New Document, a pop up box will be displayed.

Type in the **Document Name** (for example: the name of the applicant).

For the **Category** and **Sub Category**, you will need to select **Not Applicable** (the only option available). Select the blue Upload to attach the application.

Click **Save**.

Once the fields are completed, click on **Save**.

ADDRESS CHANGE

You can send a request to process an address change using the **Add Request** option in the **Requests** menu.

In the **Description** box complete the fields, then click **Save**.
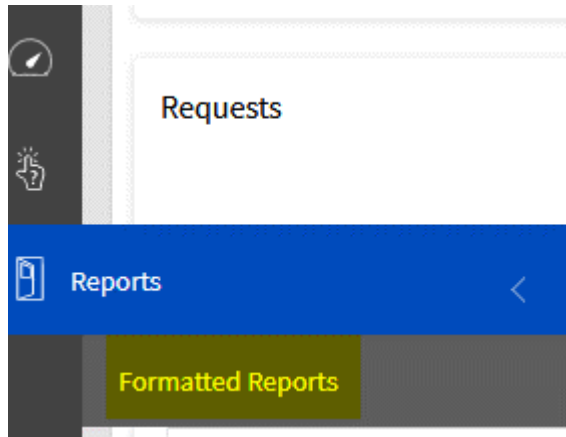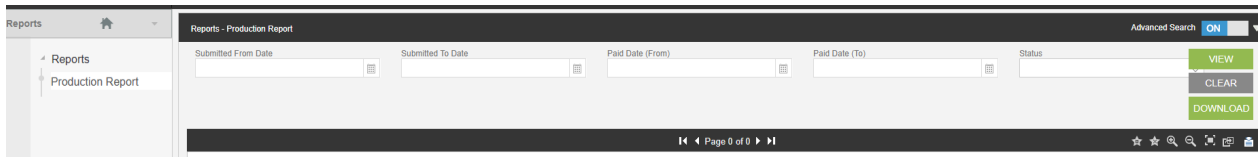
PRODUCTION REPORT

On the left side of the screen put your mouse on the open-door icon, then click formatted reports.

You can create your report using **"Submitted From Date", "Submitted To Date", "Paid Date (From)", "Paid Date (To)" and "Status".**

After you create your report, you can export to a PDF, Excel ,or HTML by putting your mouse over the paper with the arrow above it and choose how you would like to export the file.
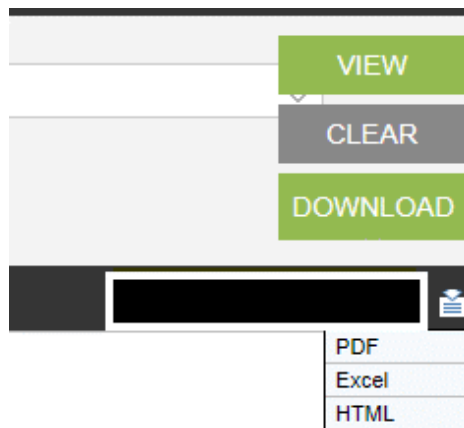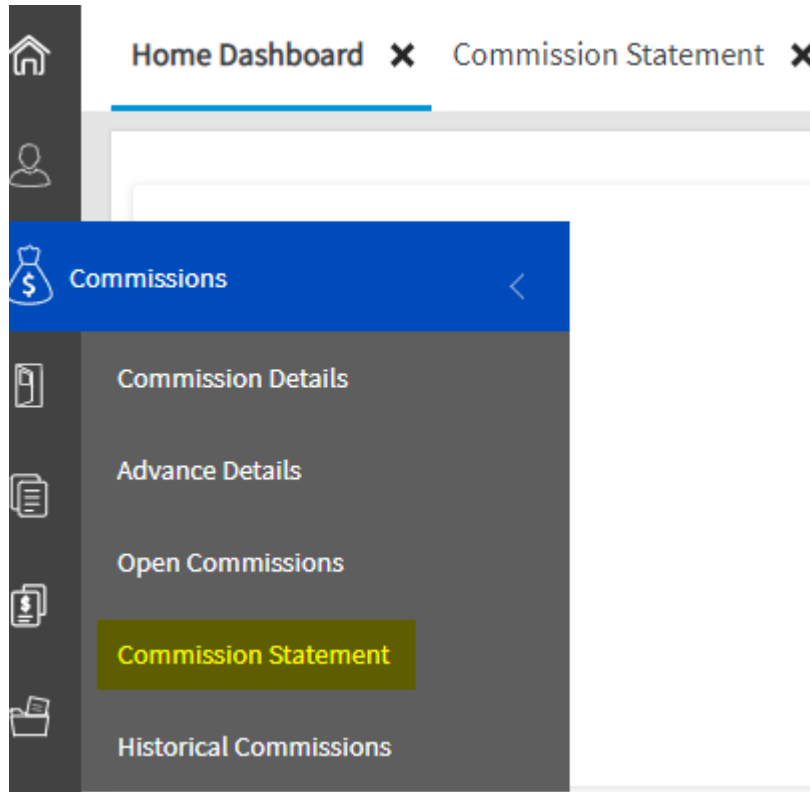
COMMISSION STATEMENTS

You can view your commission statements by putting your mouse over the money bag and clicking on **Commission Statements**.

A list of all your commission statements and the total amount paid will be displayed. You can choose to view your commission statement by PDF or Excel, just click the preferred icon to download your commissions statement.

PDF	EXCEL	Agent Name	AgentCode	Date of Commission Payment	Total	Carrier
📄	📊			10/13/2021	1603.81	LSN
📄	📊			10/06/2021	4743.62	LSN
📄	📊			09/30/2021	1780.56	LSN
📄	📊			09/29/2021	3673.38	LSN

Your download will show up on the bottom of your screen, click on it to open.
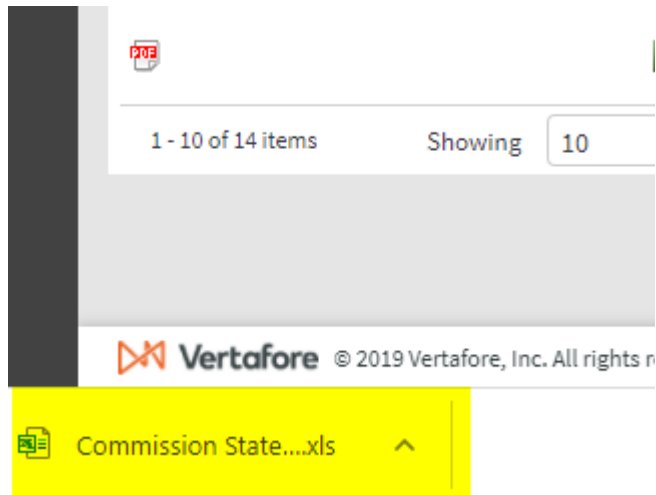
View Historical Commissions (prior to August 2021):

Underneath the Commission menu, click on Historical Commissions. These will display by policy. You can download these as a .CSV or Excel sheet.