

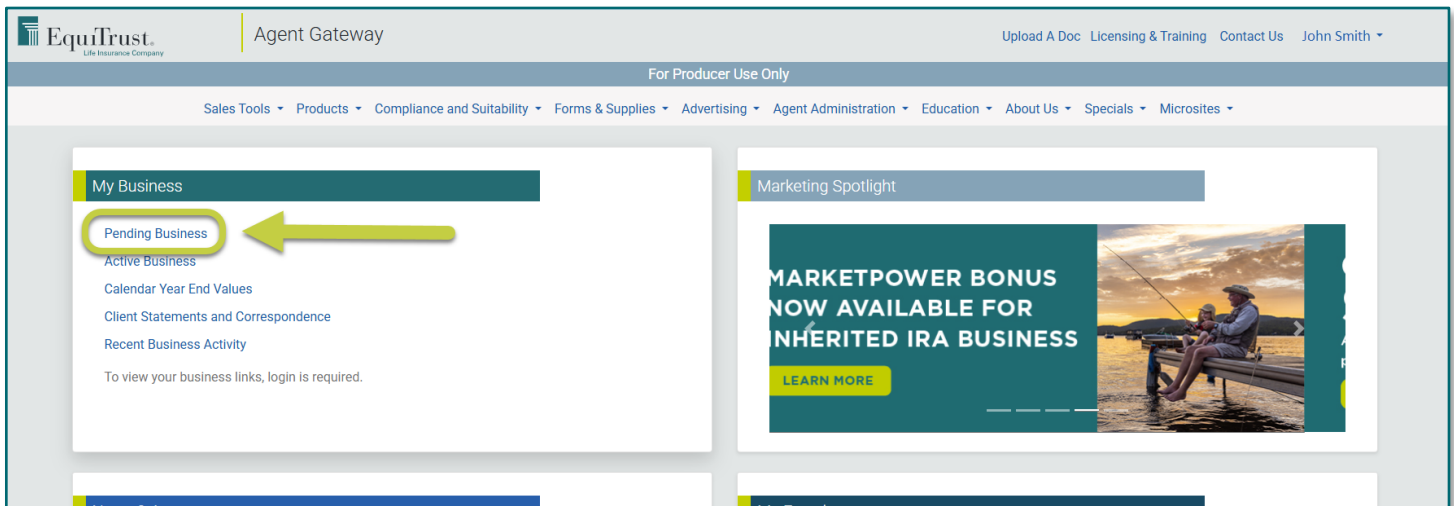
EquiTracker User Guide

EquiTrust Agent Website

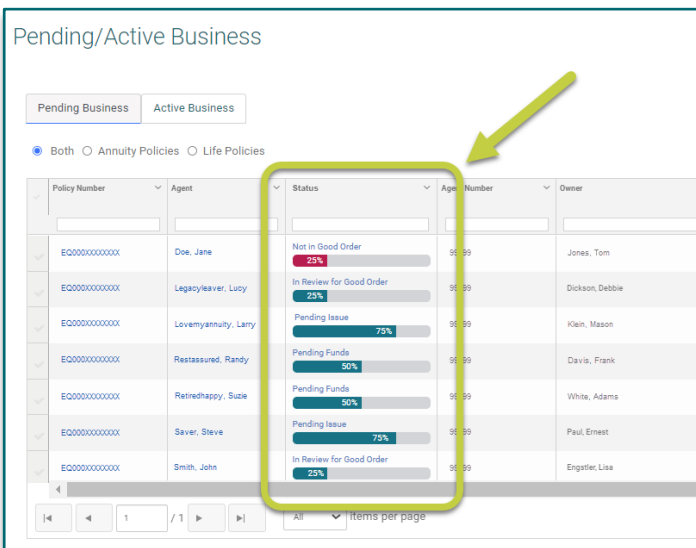
EquiTracker is a powerful automated transaction status tracking tool that provides logged-in users of the [EquiTrust Agent Website](#) an at-a-glance view of their new business case statuses in real time.

Let's Get Started

- Log in to your Agent Website account.
- Click on the [Pending Business](#) link under the *My Business* quadrant of the homepage.



EquiTracker - Simplified View



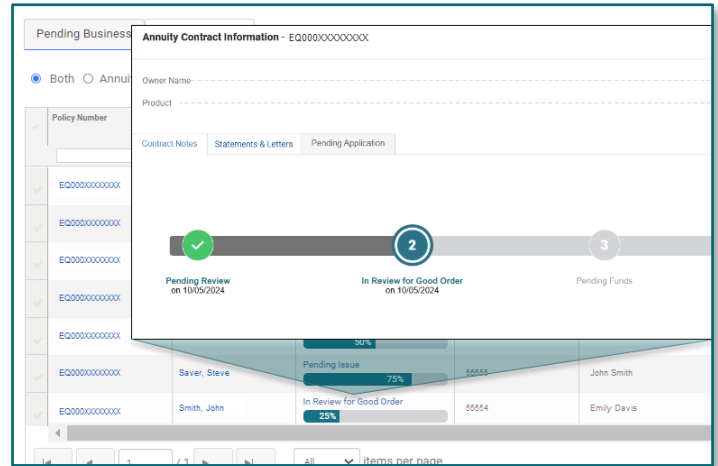
- EquiTracker is embedded as a column titled *Status* in the *Pending Business* grid and provides a simplified view of the statuses for New Business cases as they move through the processing stages.
- You can filter results by status using the text field at the top of the column or sort by status simply by clicking the title of the column.
- Additionally, clicking the status for a line item will open a contract details modal providing detail about when the case reached each stage.

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EquiTracker - Detailed View

- To access a more detailed view, simply click on the status bar and the contract details modal will open.
- From the contract details modal view, you can review additional information such as contract notes and when the case reached each stage.



EquiTracker Status Definitions

In Review for Good Order

Application packet has been received and is being reviewed 1) to ensure paperwork is correct and complete (Florida Accredited Investor Certification, Inherited or Stretch IRA, Entity Certification, Across State Lines sale review, premium exception request, Agent Contracting/Licensing) and 2) for suitability (if an annuity), or 3) a Not-In-Good-Order (NIGO) requirement has been received and is being reviewed to ensure the case is now in good order.



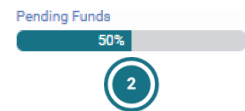
Not in Good Order (NIGO)

Application was deemed Not-In-Good-Order (NIGO) and is awaiting resolution. Action is needed from the agent to provide corrected paperwork or additional information.



Pending Funds

Waiting on funds to be received. If funds are coming from another financial institution, the transfer paperwork has been sent to the other company. If funds are coming from a personal check, we are awaiting receipt of the check.



Pending Issue

All funds have been received and the case is in line for issue.



Complete

Contract/policy has been issued.



Declined

Application has been reviewed and has been declined.

