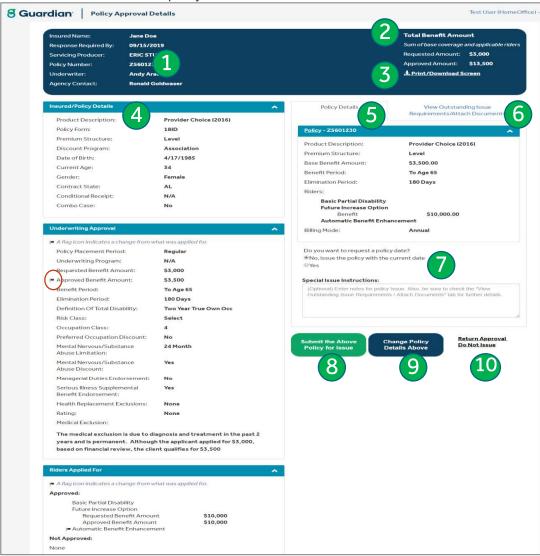
How To: Access & Navigate the eOffer/ePolicy Delivery Dashboard

Policy Approval Details Screen

- 1. The Policy Approval Details banner lists the insured, producer, underwriter and agency contact.
- 2. The **Total Benefit Amount** shows the benefit originally requested and the benefit approved. These amounts are the sum of the base coverage and applicable riders (i.e. FIO, SIS).
- Use Print/Download Screen to save a copy of the Policy Approval Details screen to email a producer without GOL access.
- 4. The Insured/Policy Details, Underwriting Approval and Riders Applied For sections in the left column of the screen provide the information and explanation about the underwriting decision. A flag icon appears next to a benefit changed from what was applied for.
- 5. Your action is needed on the right column of the screen. The **Policy Details** tab shows the policy benefits configured as approved by underwriting
- 6. The **View Outstanding Issue Requirements/Attach Documents** tab (not shown) lists outstanding requirements needed for Guardian to issue the policy, provides quick links to the illustration system and forms on GOL, and allows documents to be attached for submission to Guardian with the policy issue request.
- 7. The **policy dating** question and **Special Issue Instructions** area let you communicate requests not already captured by the policy configuration.
- 8. To request the policy be issued, select the **Submit the Above Policy for Issue** button. An email notification is generated to the agency and servicing producer when a case is submitted for issue.
- 9. The Change Policy Details Above button lets you edit the policy details within the underwriting limit.
- 10. Select the **Return Approval Do Not Issue** link to return the case for risk reconsideration* or request the case be closed with no policy issued.



*Underwriting is not alerted to the reconsideration request. The agency is notified via email with details specified by the producer. The agency must contact underwriting via email or phone, as appropriate