



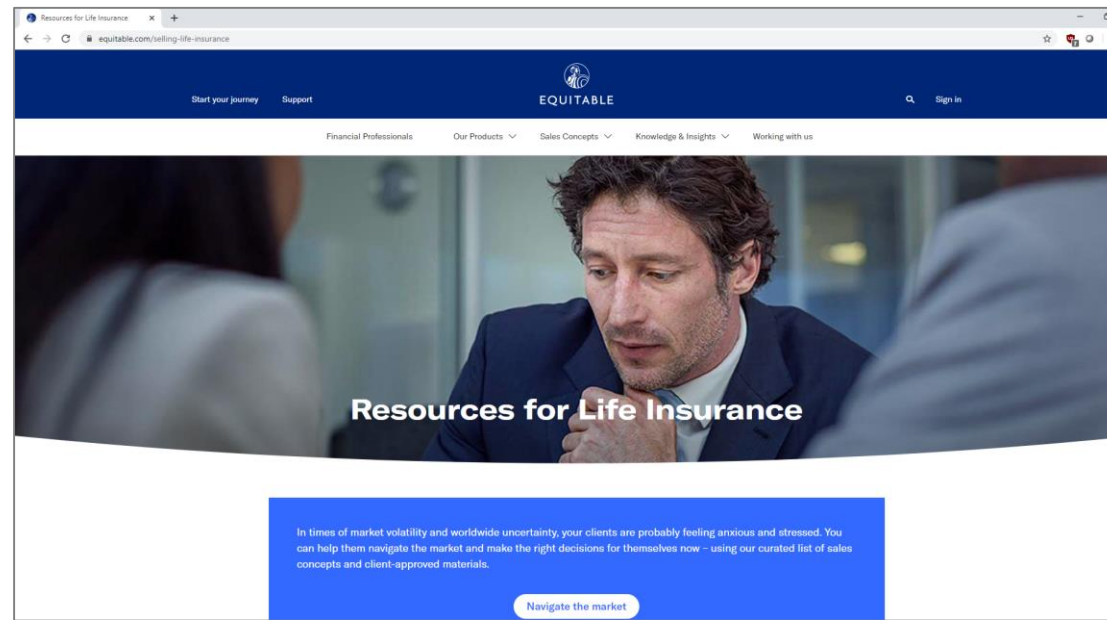
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Uploading Documents

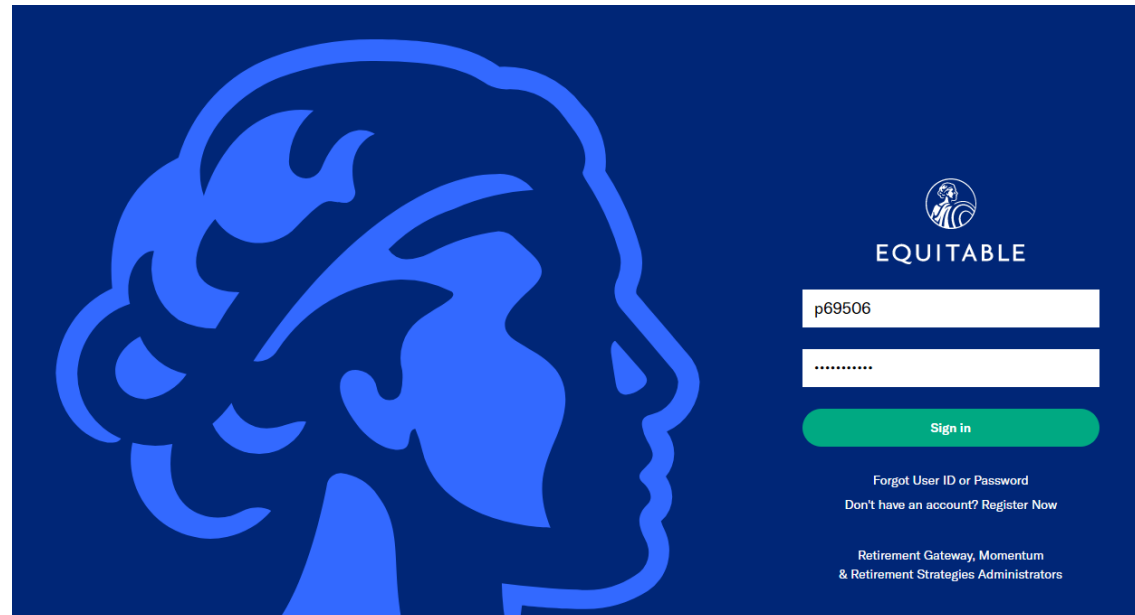


1

Log in




www.equitable.com



Login in with
username &
password

2

This is your
home screen



EQUITABLE
ADVISORS

HELLO
Crystal Quicano

SEARCH

CHAT

ALERTS

TOOLS

MENU

Dashboard

EAVU

During these challenging times, we remain focused on our mission to help you serve your clients. While our operations centers remain open to assist you, our hours are now limited to **8:30am to 4:30pm EST Monday through Friday**. We are operating with a reduced staff and our hold times may be longer than normal. As a result, we strongly encourage you to utilize online capabilities to assist your clients when possible.

Good day Crystal Quicano [Daily Service PIN:](#)

Check out the new **TECHNOLOGY HUB!**

Your "Go To" place for technology updates, incident reporting, enhancements and more!

Click [here](#) for A New Way to View Inforce Alerts

Notifications

Refresh Hide

CLIENT SEARCH

Insured Name/Policy #

PCs

Show

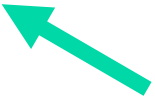
ADR →

POP Reports →

Total Rewards →

Financed Validation Reports →

Client Management





Search here

3

Access cases

Click [here](#) for A New Way to View Inforce Alerts

Notifications

Refresh  Hide 

CLIENT SEARCH

Insured Name/Policy #

ESIGNATURE

0

My Signature (s)
Pending

>

0

Expiring

>

0

Signature
Pending

>

NEW BUSINESS

0

Notifications

>

0

Outstanding Requirements

>

0

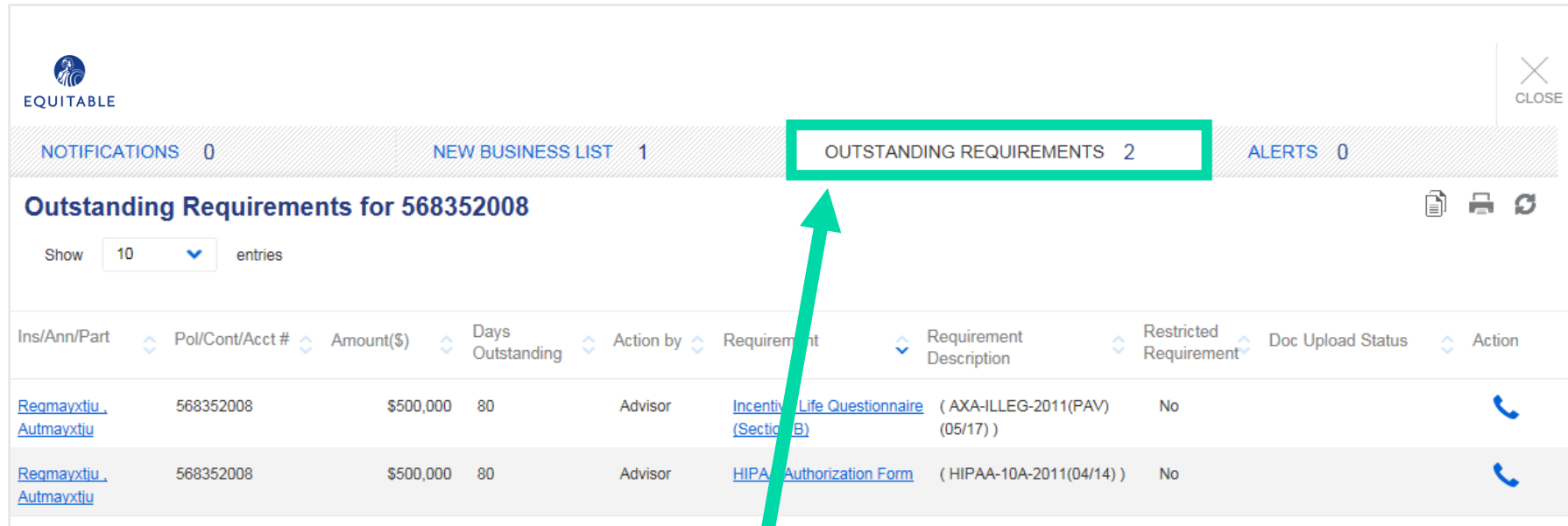
List

>

Enter search criteria

4

Outstanding Requirements



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NOTIFICATIONS 0 NEW BUSINESS LIST 1 **OUTSTANDING REQUIREMENTS 2** ALERTS 0

Outstanding Requirements for 568352008

Show 10 entries

Ins/Ann/Part	Pol/Cont/Acct #	Amount(\$)	Days Outstanding	Action by	Requirement	Requirement Description	Restricted Requirement	Doc Upload Status	Action
Reqmayxtiu Autmayxtiu	568352008	\$500,000	80	Advisor	Incentive Life Questionnaire (Section B)	(AXA-ILLEG-2011(PAV) (05/17))	No		
Reqmayxtiu Autmayxtiu	568352008	\$500,000	80	Advisor	HIPAA Authorization Form	(HIPAA-10A-2011(04/14))	No		

Click on outstanding requirements

This will allow you to access the outstanding requirements and give you the ability to upload.

5

Upload

EQUITABLE

Policy/Contract/Account#: 568352008
Product : IncentiveLife Legacy III, Series 156

Insured/Annuitant/Participant Name : Regmayxtju , Autmayxtju
Insured/Annuitant/Participant Rating :

Application Received UW Initial Req Received & Reviewed UW Decision Final Req Received & Reviewed Policy Printed & Issued Delivery Receipt Policy Inforce

Requirements

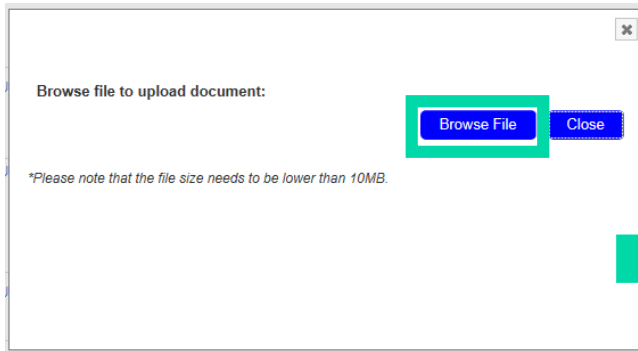
Action	Status	Requirement	Comments	Obtained By	Required For	Days Outstanding	Created	Received	Reviewed
Upload	Outstanding	Incentive Life Questionnaire (Section B) PDF	(AXA-ILLEG-2011(PA more	AGENT	Underwriting Offer	80	05/11/2018		
Upload	Outstanding	HIPAA Authorization Form PDF	(HIPAA-10A-2011(04 more	AGENT	Underwriting Offer	80	05/11/2018		
	Received	Medical Information Questionnaire (Section C) PDF	(AXA-MED-2011FL)	AGENT	Underwriting Offer	80	05/11/2018	05/10/2018	
	Received	Notice & Consent Form		AGENT	Underwriting Offer	80	05/11/2018	05/10/2018	
	Received	Incentive Life Questionnaire (Section B) PDF	(AXA-ILOPT-2011(PA more	AGENT	Underwriting Offer	80	05/11/2018	05/10/2018	
	Received	Beneficiary Supplemental Form PDF	(BEN2012)	AGENT		80	05/11/2018	05/11/2018	
	Received	Signed Application PDF	Submit fully complet more	AGENT	Underwriting Offer	80	05/11/2018	05/11/2018	

Click on upload

If the document is available to be uploaded, this notification will be placed under the Action column.

6

**Follow prompts to
complete the process**

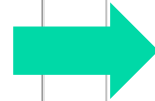


Browse file to upload document:

[Browse File](#) [Close](#)

*Please note that the file size needs to be lower than 10MB.

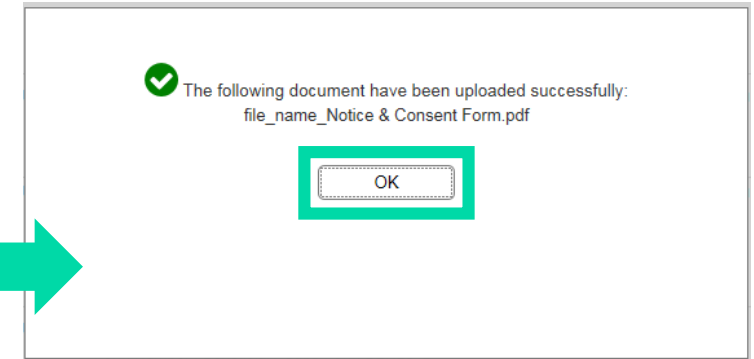
This screenshot shows a dialog box with a title bar containing a close button. The main text is "Browse file to upload document:". Below this text are two buttons: "Browse File" and "Close". The "Browse File" button is highlighted with a green rectangular box. At the bottom of the dialog, there is a small note: "*Please note that the file size needs to be lower than 10MB."



File Name: Notice & Consent Form.pdf [Remove](#)

[Cancel](#) [Upload](#)

This screenshot shows a dialog box with a title bar containing a close button. The main text is "File Name: Notice & Consent Form.pdf" followed by a "Remove" link. Below this text are two buttons: "Cancel" and "Upload". The "Upload" button is highlighted with a green rectangular box.




✓ The following document have been uploaded successfully:
file_name_Notice & Consent Form.pdf

[OK](#)

This screenshot shows a dialog box with a title bar containing a close button. The main text is "✓ The following document have been uploaded successfully:" followed by "file_name_Notice & Consent Form.pdf". Below this text is a button labeled "OK", which is highlighted with a green rectangular box.

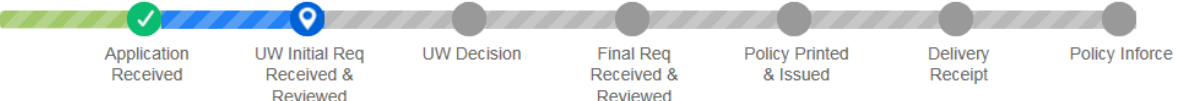
7

Final Step: Check Status









 **EQUITABLE**



Policy/Contract/Account#: 568352008 **Insured/Annuitant/Participant Name :** Regmayxtju , Autmayxtju

Product : IncentiveLife Legacy III, Series 156 **Insured/Annuitant/Participant Rating :**



Requirements

Action	Status	Requirement	Comments	Obtained By	Required For	Days Outstanding	Created	Received	Reviewed
 Upload	Outstanding	Incentive Life Questionnaire (Section B) 	(AXA-ILLEG-2011(PA more	AGENT	Underwriting Offer	80	05/11/2018		
 Upload	Outstanding	HIPAA Authorization Form 	(HIPAA-10A-2011(04 more	AGENT	Underwriting Offer	80	05/11/2018		
	Received	Medical Information Questionnaire (Section C) 	(AXA-MED-2011FL)	AGENT	Underwriting Offer	80	05/11/2018	05/10/2018	
	Received	Notice & Consent Form		AGENT	Underwriting Offer	80	05/11/2018	05/10/2018	
	Received	Incentive Life Questionnaire (Section B) 	(AXA-ILOPT-2011(PA more	AGENT	Underwriting Offer	80	05/11/2018	05/10/2018	
	Received	Beneficiary Supplemental Form 	(BEN2012)	AGENT		80	05/11/2018	05/11/2018	
	Received	Signed Application 	Submit fully complet more	AGENT	Underwriting Offer	80	05/11/2018	05/11/2018	

Notice & Consent Form   Und INSD BGA Underwriting 07/18/2018 08/01/2018
Form Number : Notice & Consent Form- 180-316DC Offer
(09/2016)
Upload status: In progress
Notice & Consent Form.pdf

Uploading status*

* Documents can take from 10 Minutes to 2 Hours to upload

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