

Because  
your time  
matters...



Step 1

ENTER

Step 2

VALIDATE

Step 3

SUBMIT



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# 1. AG Quick Ticket Navigation

This section outlines the basic navigation features found within AG Quick Ticket.

## 1.1—Status of Business Page

The [Status of Business](#) page is an online summary screen for all tickets that a user has the authorization to view. From here, a variety of actions may be initiated by the user.

Owner	Owner	Application	Carrier	Product	Face	Updated	Carrier	Application #	Advisor	Insured	Insured	State	AgentId
Pam Johnson		Draft	American Genera...	AG Secure Lifet...	\$100,000	Jan 24 2012 5:...		AGLC0000020621	Agent Name Pam Johnson			Alabama	55555
Sarah Brown	XXX-XX-1111	Ready to Valida...	American Genera...	AG ROP Select-a...	\$500,000	Jan 24 2012 5:...		AGLC0000020620	Agent Name Sarah Brown	XXX-XX-1111		Illinois	55555
Mike Jones	XXX-XX-1111	Validated - Awa...	American Genera...	AG Select-a- Ter...	\$250,000	Jan 24 2012 4:...		AGLC0000020619	Agent Name Mike Jones	XXX-XX-1111		California	55555

## 1.2—Idle Logout

To maintain the security of the data and prevent unauthorized access, AG Quick Ticket automatically logs out the user after 60 minutes of inactivity. Data on each page is saved as the user moves through the wizard. Additionally, the content of a page may be saved at any point by clicking the [Close](#) or [Save](#) button. If a page is not saved and the system goes idle, that page's information will be lost.

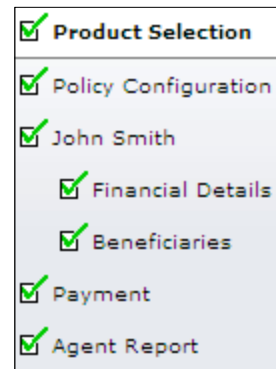
## 1.3—Close Button

Use the [Close](#) button at the top of each screen to end the session.

## 1.4—AG Quick Ticket Application Wizard

The AG Quick Ticket data entry screens (or Application Wizard) provide a reflexive, consistent data entry model for entering an electronic ticket.

- **Product Selection** – Identify the product and the application state
- **Policy Configuration** – Set up the application by identifying coverage amounts, riders and reason for insurance
- **Insured** – Demographic, identification, rate class quoted and any existing insurance
- **Financial** – Income and net worth
- **Beneficiary** – Collect primary and contingent beneficiary information
- **Payment** – Schedule premium and mode
- **Agent Report** – Agent questions and agreements



## 2. Legend and Available Actions

Legends are viewable at the top of the Status of Business page and the wizard pages. The legend is a graphic representation of the actions available for each ticket. The available actions are determined by the status of the ticket. When a ticket is selected on the Status of Business screen or when the ticket is open, the action buttons available for use on that ticket are active.

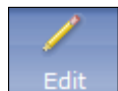
Legend on the Status of Business page



Legend when a ticket is open



### 2.1—Edit Existing Ticket



If a user closes a ticket before it has been submitted, the ticket is assigned a status of **Draft** and generates an Application ID that is displayed on the Status of Business page. The user may edit these pending tickets, which can be accessed from the Status of Business page. Clicking the **Edit** icon on the Status of Business page enables editing. The first page of the application displays.

Within a ticket, a list of all screens is displayed in the left navigation panel. Click on a link for a page to review the information on that particular page. Please be careful to save the information on the current page to prevent losing the unsaved information. The left navigation pane is dynamic in nature and changes as the user proceeds through the ticket.

## 2.2—Validate Ticket



Before a ticket can be submitted, the Validation must be performed to verify that the ticket is in good order. This process becomes available from a prominent **Validate** button after all required information has been provided on the ticket. The validation process includes categories of vetting errors that may be encountered:

- Ensure that all addresses have valid zip codes that match the state, and all SSN/TIN tax identification numbers appear to be valid.
- Enforce all product rules including min/max ages, min/max coverage amounts, rider restrictions, etc.
- Validate all state-specific rules are followed.
- Validations at the field level are to ensure that the user enters complete data. Some of the field-level validations are to ensure that:
  - Mandatory fields are provided by the user.
  - Names do not contain numbers or special characters.
  - Numeric fields do not contain letters or special characters.
  - Formatting for standard data entry fields like Social Security numbers, phone numbers, zip codes, etc.
  - When a required field is skipped, the field turns yellow.

When there are errors, the page name on which the errors reside turns **red** in the AG Quick Ticket Navigation Pane. At the top of each page with errors, the relevant errors or warnings are displayed. The user can choose to resolve or accept warnings, but must correct all errors. When all errors are corrected and the ticket validates successfully, the user can **Submit** the ticket. Validation can be performed from the data entry screens or from the **Status of Business** screen.

AG QUICK TICKET Powered by EbixExchange's LIFE SPEED

Status of Business | New Application

Application [AGLC0000019981]: Vetting Warnings Carrier : American General Life Insurance Company Product : AG Secure Lifetime GUL

Validate: Successful

- ✓ Product Selection
- ✓ Policy Configuration
- ✓ John Smith
  - ✓ Financial Details
  - ✓ Beneficiaries
- ✓ Payment
- ✓ Agent Report

View Details | Comment | Validate | Submit | Save | Print/Sign | Attach | Previous | Next

**Warnings**

The following warnings were found:

**Product Selection**

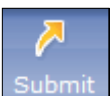
- The product being requested requires an unsigned quote be submitted directly to American General.

If these warnings are acceptable, please click the Accept Warnings button.

Accept Warnings

Previous | Next

## 2.3—Submit Ticket



When all errors are fixed and the ticket validates successfully, the agent can **Submit** the ticket to ExamOne to complete the interview, schedule the paramed, etc.. After a ticket has been submitted, no changes are allowed. The **Submit** button is found on Status of Business tab and in the wizard.

## 2.4—Transaction Detail Report



The Transaction Detail Report (TDR) provides a consolidated view of the detailed information entered by the user for each application and comments for each transaction. The page displays information for the insured, beneficiary, payment, and agent attestations.

Clicking on the [View Details](#) action button will bring up the TDR for the highlighted ticket on the [Status of Business](#) tab or can be opened by clicking on the View action button in the wizard.

The bottom of the TDR displays the history of the steps that have been taken. These are date and time stamped, and displays the Logon ID of the user who generated that step.

The user may print a copy of the Transaction Detail Report by clicking on the [Printer](#) icon on the top or bottom right section of the TDR. Sample of a TDR:

Transaction Detail Report				
Application ID	AGLC0000020619			
Policy Number				
Transaction Status	Validated - Awaiting Submission			
Carrier Case Status				
Last Modified (yyyy-mm-dd)	2012-01-24			
Application State	California			
Product Type	Term Insurance			
Insurance Company	American General Life Insurance Company			
Product	AG Select-a-Term March 2011			
Agent Information				
Agency Code	55555			
	First Name	Last Name	Agent Code	Commission Split %
Writing Agent	Writing	Agent	55555	100
Policy Configuration				
Reason for Insurance	Key man			
Duration years	15 years			
Face Amount	\$250,000.00			
Riders / Benefits				
AG Select-a-Term March 2011				Yes
Waiver of Premium				No
Accidental Death Benefit Rider				Yes
Disability Income Rider				No
Child Rider				No
Select Income Rider				No
Terminal Illness Rider				Yes
				\$100,000.00 units

## 2.5—Ticket Comments

Comments can be entered at any time while completing the ticket or from the [Status of Business](#) tab. Click on the [Comment](#) action button to open the comment screen for a draft or submitted ticket. Comments are for user use only and will not be transmitted to ExamOne or American General.

When the Comment button is selected, the following screen appears:

**Comments Summary** 12/19/2011

Comments are for internal use only and will not be transmitted to the insurance company.

**New Comment:** \*

Transaction Step:  ▼

**Previous Comments:**

No comment is available

- Wizard Steps - Product Selection
- Wizard Steps - Policy Configuration
- Wizard Steps - Primary Insured
- Wizard Steps - Payment
- Wizard Steps - Agent Report

The user may make a general note, or can attach it to a particular page in the wizard. If there are previous comments entered, they appear at the bottom of the Comment Summary screen:

**Comments Summary** 1/24/2012

Comments are for internal use only and will not be transmitted to the insurance company.

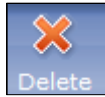
**New Comment:** \*

Transaction Step:  ▼

**Previous Comments:**

Date	Transaction Status	User	Class
1/24/2012 4:55:04 PM	Validated - Awaiting Submission	Agent Name	Sales Representative
<b>Transaction Step</b>	Product Selection		
<b>Comment</b>			
Comment			

## 2.6—Delete Ticket



Allows the user to delete a ticket. When a ticket is highlighted and the **Delete** button is clicked, the user will receive a confirmation message asking if they are sure they want to delete the transaction. A submitted ticket cannot be deleted. If a ticket has been submitted in error, the user must contact ExamOne.

The screenshot shows the AG QUICK TICKET interface. A confirmation dialog box is displayed in the center, asking "Are you sure you want to Delete this Transaction?" with "Delete" and "Cancel" buttons. The background shows a toolbar with icons for Validate, Submit, Edit, Approve, Decline, Suspend, and Attach. Below the toolbar is a search section with "Search Option: Advisor Name" and "Search Criteria:" fields. A table of tickets is visible at the bottom.

Owner	Owner	Application	Carrier	Product	Face	Updated	Carrier	Application #	Advisor	Insured	Insured	State	AgentId
Mike Jones	XXX-XX-1111	Validated - Awa...	American Genera...	AG Select-a- Ter...	\$250,000	Jan 24 2012 4:...		AGLC0000020619	Agent Name	Mike Jones	XXX-XX-1111	California	55555

If the user clicks on the **Delete** confirmation button, the ticket will appear on the Status of Business page with a Transaction Type of Deleted.

## 2.7—Application Attachments



This feature allows the user to attach an unsigned quotation to any AG Secure Lifetime GUL®II ticket.

# 3. Status of Business Page

The **Status of Business** page provides a view through which the user may review and manage all tickets in the system the user has created. From this view, the user sees a summary of the ticket information, search and sort features, and actions available for each ticket. In order to act on a ticket, the user needs to click on the ticket and then click on the desired action on the toolbar. Based on the status of the ticket, certain actions might not be available.

The screenshot shows the AG QUICK TICKET interface. The top bar includes "Welcome, Agent Name | Close" and "04:03:19 PM". The main header shows "AG QUICK TICKET Powered by EbixExchange's LIFE SPEED". Below this are dropdown menus for "Status of Business" and "New Application". A toolbar contains icons for Validate, Submit, Edit, View, Comment, Print/Sign, Delete, Approve, Decline, Suspend, and Attach. Below the toolbar is a search section with "Search Option: Advisor Name" and "Search Criteria:" fields. A table of tickets is visible at the bottom.

Owner	Owner	Application	Carrier	Product	Face	Updated	Carrier	Application #	Advisor	Insured	Insured	State	AgentId
Pam Johnson		Draft	American Genera...	AG Secure Lifet...	\$100,000	Jan 24 2012 5:...		AGLC0000020621	Agent Name	Pam Johnson		Alabama	55555
Sarah Brown	XXX-XX-1111	Ready to Valida...	American Genera...	AG ROP Select-a...	\$500,000	Jan 24 2012 5:...		AGLC0000020620	Agent Name	Sarah Brown	XXX-XX-1111	Illinois	55555
Mike Jones	XXX-XX-1111	Validated - Awa...	American Genera...	AG Select-a- Ter...	\$250,000	Jan 24 2012 4:...		AGLC0000020619	Agent Name	Mike Jones	XXX-XX-1111	California	55555



## Filtering and Sorting Transaction Data

The ability to filter and sort the transaction details is provided through the use of both the [Search Option](#) and [Search Criteria](#) in the center of the page and the Transaction Details column headings – Owner, Transaction, Face Amount, Last, Application ID, etc.

Clicking on the [Basic Search](#) button will allow a single Search Option and Search Criteria. Search Options include Advisor Name, Agent ID, Application ID, Carrier, Carrier Status, Face Amount, Insured Name, Insured SSN, Last Update/Date Time, Owner Name, Owner Tax ID, Product, Solicitation State, and Transaction Status. The Search Criteria may be a free-form text field, a drop-down box, a radio button or a Date search. Inserting search criteria allows the user to recall one or more specific transactions to the screen.

AG QUICK TICKET Powered by EbixExchange's LIFE SPEED

Status of Business | New Application

Validate | Submit | Edit | View | Comment | Print/Sign | Delete | Approve | Decline | Suspend | Attach

Please select the Search Options, enter Search Criteria, and click on the Search button.

Search Option: **Advisor Name** Search Criteria:  Search **Advanced Search** Customize

Owner	Owner	Application	Carrier	Product	Face	Updated	Carrier	Application #	Advisor	Insured	Insured	State	AgentId
Pam Johnson		Draft			\$100,000	Jan 24 2012 5:...		AGLC0000020621	Agent Name	Pam Johnson		Alabama	55555
Sarah Brown	XXX-XX-1111	Ready to Valid...			\$500,000	Jan 24 2012 5:...		AGLC0000020620	Agent Name	Sarah Brown	XXX-XX-1111	Illinois	55555
Mike Jones	XXX-XX-1111	Validated - Awa...			\$250,000	Jan 24 2012 4:...		AGLC0000020619	Agent Name	Mike Jones	XXX-XX-1111	California	55555
John Smith	XXX-XX-1111	Ready to Valid...			1,000,000	Jan 24 2012 4:...		AGLC0000020618	Agent Name	John Smith	XXX-XX-1111	Alabama	55555

### 3.1—Advanced Search

When the user enters the Status of Business page, all tickets are listed that the user has access to view.

Users may filter the view of their tickets via the [Advanced Search](#) button located in the Search portion of the page. This section contains text boxes and drop-down boxes from which a user may select filter criteria. A filter option exists for each column of data displayed in the transaction detail on the lower portion of the screen, in addition to a few extra criteria.

AG QUICK TICKET Powered by EbixExchange's LIFE SPEED

Status of Business | New Application

Validate | Submit | Edit | View | Comment | Print/Sign | Delete | Approve | Decline | Suspend | Attach

Please select the Search Options, enter Search Criteria, and click on the Search button.

Search Option: **Advisor Name** Search Criteria:  Search **Advanced Search** Customize

Owner	Owner	Application	Carrier	Product	Face	Updated	Carrier	Application #	Advisor	Insured	Insured	State	AgentId
Pam Johnson		Draft	American Genera...	AG Secure Lifet...	\$100,000	Jan 24 2012 5:...		AGLC0000020621	Agent Name	Pam Johnson		Alabama	55555
Sarah Brown	XXX-XX-1111	Ready to Valid...	American Genera...	AG ROP Select-a...	\$500,000	Jan 24 2012 5:...		AGLC0000020620	Agent Name	Sarah Brown	XXX-XX-1111	Illinois	55555

**AG QUICK TICKET** Powered by EbixExchange's **LIFE SPEED**

Status of Business New Application

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**Status of Business**

Validate Submit Edit View Comment Print/Sign Delete Approve Decline Suspend Attach

Please select the Search Options, enter Search Criteria, and click on the Search button.

Search Option	Search Criteria	
Advisor Name	<input type="text"/>	And
Advisor Name	<input type="text"/>	And
Advisor Name	<input type="text"/>	Search

Basic Search Customize

Owner	Owner	Application	Carrier	Product	Face	Updated	Carrier	Application #	Advisor	Insured	Insured	State	AgentId
-------	-------	-------------	---------	---------	------	---------	---------	---------------	---------	---------	---------	-------	---------

To filter for a more specified search, the user can enter up to three Search Option values with Search Criteria. By clicking on the **Search** button, all tickets that satisfy the criteria will be displayed and will be available for viewing by the user. Some search options, such as Name and Insured SSN, are "like" comparisons so the user is not required to enter a complete name or Social Security number. Multiple search options/criteria can be used to further define a search.

**AG QUICK TICKET** Powered by EbixExchange's **LIFE SPEED**

Status of Business New Application

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**Status of Business**

Validate Submit Edit View Comment Print/Sign Delete Approve Decline Suspend Attach

Please select the Search Options, enter Search Criteria, and click on the Search button.

Search Option	Search Criteria	
State	Alabama	And
Product	AG Secure Lifetime GUL	And
Advisor Name	<input type="text"/>	Search

Basic Search Customize

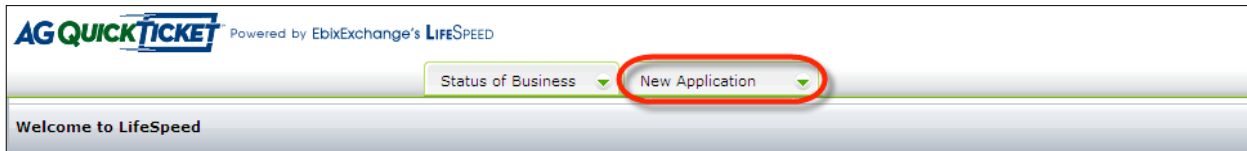
Owner	Owner	Application	Carrier	Product	Face	Updated	Carrier	Application #	Advisor	Insured	Insured	State	AgentId	Process
Pam Johnson		Draft	American Genera...	AG Secure Lifet...	\$100,000	Jan 24 2012 5:...		AGLC0000020621	Agent Name Pam Johnson			Alabama	55555	Application
John Smith	XXX-XX-1111	Ready to Valida...	American Genera...	AG Secure Lifet...	\$1,000,000	Jan 24 2012 4:...		AGLC0000020618	Agent Name John Smith	XXX-XX-1111		Alabama	55555	Application

## 4. Application Wizard

The wizard is triggered when the user attempts to enter a new ticket or edit, an existing ticket. The wizard ensures that the data entered is consistent, validates user input, generates follow-up questions and validates the data with product rules.

### 4.1 —Create New Application

To create a new application, click on the [New Application](#) tab.



The first screen that appears is the Product Selection screen. This screen defines the solicitation state, the product type, the life insurance carrier, the product and the name of the agent. If there will be a 1035 exchange, the Absolute Assignment form AGLC0010-2011 needs to be completed and mailed to the Home Office. The Absolute Assignment form requires the original signature and cannot be faxed or imaged in. In the state of Florida, if the client would like a Comparative Information Form LD2606, this form needs to be completed by the agent. One copy should remain with the applicant and the other should be sent to the Home Office. The copy of the Comparative Information Form can be faxed to the Home Office.



The screenshot shows the 'New Application : Product Selection' screen. At the top, there is a navigation bar with 'Status of Business' and 'New Application' tabs. Below the tabs, there is a toolbar with icons for 'View Details', 'Comment', 'Validate', 'Submit', 'Save', 'Print/Sign', 'Attach', 'Previous', and 'Next'. The main content area is divided into two sections: 'Product Selection' and 'Agent Information'. The 'Product Selection' section contains the following fields:

Application State*	Alabama	Forms must be signed in this state.
Product Type*	Universal Life	
Insurance Company*	American General Life Insurance Company	
Product*	AG Secure Lifetime GUL	

The 'Agent Information' section contains the following fields:

	First Name	Last Name	Agent Code	Commission Split %	
Writing Agent*	agent	name	55555	100	Add

At the bottom right, there are 'Previous' and 'Next' buttons.

When the [Next](#) button is selected, AG Quick Ticket determines all the screens needed to complete that ticket request.

## 4.2—Visited and Completed Pages

When all required fields have been completed on a screen, a green check mark appears next to the page name on the left-hand side. If a page has required fields that are not completed, then no check mark appears next to that page name.

The screenshot shows a navigation pane on the left with the following items checked: Product Selection, John Smith, Financial Details, Beneficiaries, Payment, and Agent Report. The Policy Configuration page is currently selected and is highlighted in red. The main content area displays the Policy Configuration form with the following fields: Reason for Insurance\* (Estate Planning), Face Amount\* (light yellow shading), Death Benefits Option\* (Level), and Death Benefit Compliance Test Used\* (Cash Value Accumulation Test (CVAT)). Below the form, the Riders / Benefits section shows AG Secure Lifetime GUL checked. The top navigation bar includes buttons for View Details, Comment, Validate, Submit, Save, Print/Sign, Attach, Previous, and Next.

## 4.3—Wizard Errors

The **Pages Visited** menu also helps to identify the existence of errors in the application wizard following Validation by highlighting the section with an error in red. The pages with errors must be corrected before the ticket can be successfully submitted to ExamOne for processing.

The screenshot shows the application wizard with an error message. The navigation pane on the left has the following items checked: Product Selection, Policy Configuration, John Smith, Financial Details, Beneficiaries, Payment, and Agent Report. The Policy Configuration page is highlighted in red. The main content area displays an error message: "Errors" with a red 'X' icon. The message states: "The following errors were found in vetting process. Click on appropriate screen highlighted in red in left panel. These errors must be cleared before the transaction can be processed." Below the message, the Policy Configuration section lists one error: "The Face Amount (\$50,000) for AG Secure Lifetime GUL should be greater than or equal to the minimum issue amount (\$100,000) for the proposed Insureds ages." The top navigation bar includes buttons for View Details, Comment, Validate, Submit, Save, Print/Sign, Attach, Previous, and Next.

## 4.4—Required Fields

Any field with a red asterisk (\*) to the right of it is a REQUIRED FIELD. Failure to complete a required field will prohibit the ticket from being submitted.

The screenshot shows the application wizard with the Policy Configuration page selected. The navigation pane on the left has the following items checked: Product Selection, Policy Configuration, Primary Insured, and Payment. The main content area displays the Policy Configuration form with the following fields: Reason for Insurance\* (dropdown menu), Face Amount\* (text input field with light yellow shading), and Death Benefits Option\* (Level dropdown menu). The top navigation bar includes buttons for View Details, Comment, Validate, Submit, Save, Print/Sign, Attach, Previous, and Next.

## 4.5—Data Capture Options

The wizard uses several data capture methods as described below:

- **Text Box:** Allows a user to enter required information



Phone Number\*

- **Drop-down List Box:** Provides an arrow to the right of a text box and allows the user to select among various options provided. The user may use the mouse or arrows on the keyboard to select items from the drop-down list.



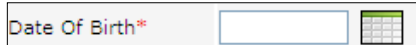
State\* Florida


- **Radio Button:** Allows the user to select one or more items from a list.



Gender \*  Female  Male

- **Date Search:** Allows the user to enter a date or select a calendar icon to choose the date.



Date Of Birth\*  

## 4.6—Wizard Navigation Buttons

An extremely important navigation rule while logged in to AG Quick Ticket is to **not** use the **back** button on the Internet browser. While in the application wizard, the **Previous** and **Next** buttons are always located at the top and bottom of the screens. These are the **only** buttons that should be used to navigate through the pages. Each time the user advances to a new page using the **Next** button, the information is saved.

- Select the **Next** arrow to go to the next page.
- Select the **Previous** arrow to return to the previous page.





*Policies issued by: American General Life Insurance Company (AGL), 2727-A Allen Parkway, Houston, Texas 77019. AG Select-a-Term Policy Form Number 07007, AG Select-a-Term Policy Form Number ICC10-07007, AG ROP Select-a-Term Policy Form Number 10001, AG Secure Lifetime GUL II Policy Form Numbers 13460, ICC13-13460. The underwriting risks, financial and contractual obligations and support functions associated with products issued by AGL are its responsibility. Guarantees are subject to the claims-paying ability of the issuing insurance company. AGL does not solicit business in the state of New York. AGL is a member company of American International Group Inc., (AIG). AIG does not underwrite any policy described herein. Policies and riders not available in all states. **Important:** Prior to soliciting business, be certain that you are appropriately licensed and appointed with the insurer and that the product has been approved for sale by the insurer in that state. © 2014 AIG. All rights reserved.*

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