

# Just-in-Time Contracting

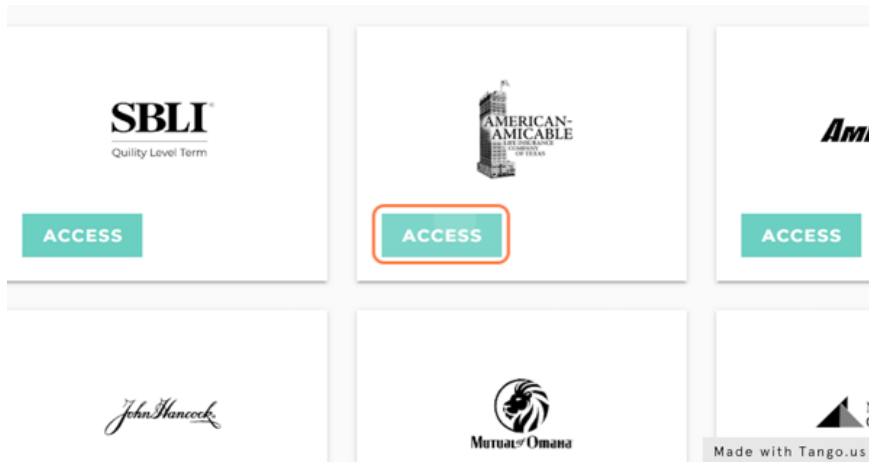
With American Amicable/Occidental

## IMPORTANT

This process must be completed in one sitting. If you stop during the process you will likely need to restart. Additionally, you will need to press "submit" AFTER the signature notification has been received.

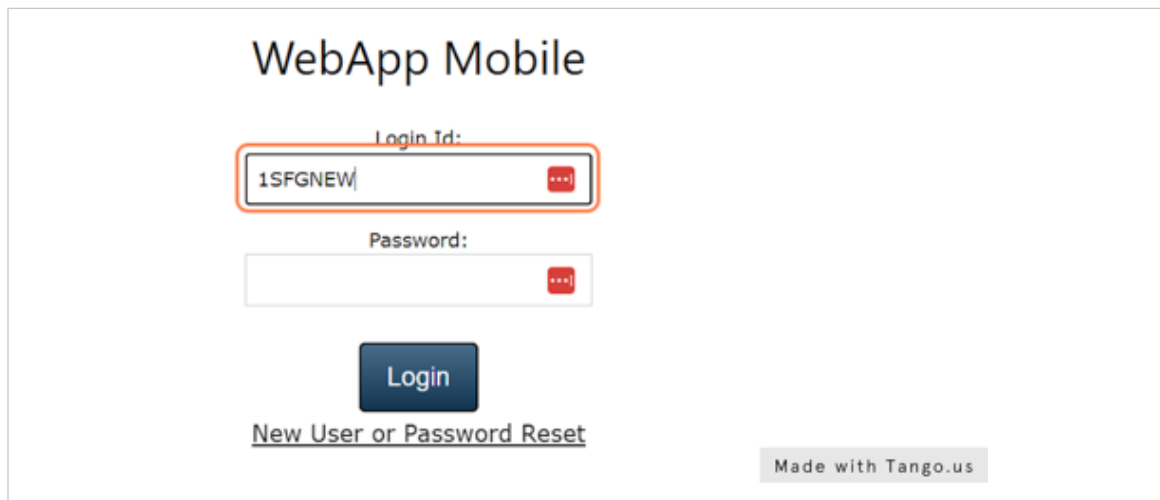
Additionally, if you live in the state of PA, you should not write an application until you receive an agent writing number from the carrier, as this state requires pre-appointment. Once your onboarding packet has been received, the Contracting department will send you links for completing this carrier contract. If you have not received it yet, feel free to inquire with the Contracting department.

1. Go to E-apps page at [hq.quality.com](https://hq.quality.com)
2. Then go E-APP under the Carrier & Products tab
3. Click on American Amicable



4. Please note - this process must be completed in one sitting. You cannot stop and come back later and complete. If you abandon and come back later you must start over.

- For login ID: **1SFGNEW** for American Amicable or **7SFGNEW** for Occidental.  
Must be in all caps!



WebApp Mobile

Login Id:

1SFGNEW

Password:

Login

[New User or Password Reset](#)

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- Repeat for password: **1SFGNEW** for American Amicable or **7SFGNEW** for Occidental password. Must be in all caps!



WebApp Mobile

Login Id:

1SFGNEW

Password:

\*\*\*\*\*

Login

[New User or Password Reset](#)

[Click Here For Tutorial](#)

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7. Click on login

Login Id:

1SFGNEW

Password:

.....

Login

[New User or Password Reset](#)

[Click Here For Tutorial](#)

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8. Click on new application

American Amicable Group Mobile Application

New Application

**Applications in Progress**
*Select Item Below to Display or Make Changes*

| Company                                                                                  | Date | Basic Coverage |
|------------------------------------------------------------------------------------------|------|----------------|
| Applications Previously Transmitted <i>(60 Day Maximum History) Select Item Below to</i> |      |                |
| Company                                                                                  | Date | Basic Coverage |
|                                                                                          |      |                |

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9. Choose the product

The screenshot shows a web application titled 'Applications'. On the left, there is a sidebar with a 'Product' dropdown menu. The main content area displays a list of insurance products in a table-like format. The products listed are: Family Legacy, Home Certainty, Term Made Simple, Survivor Protector, Legacy Builder, Express UL, Officers Benefit Association, Security Protector, and Express Term. The 'Express Term' product is highlighted with an orange border. On the right side of the screen, there is a section titled 'Item Below to Display' with a dropdown menu labeled 'App'. At the bottom right, there is a watermark that says 'Made with Tango.us'.

10. Continue with application process.

11. Near the end of the application process it will ask for the agent's email address, which is a required field, and the upline manager name, which is not a required field. Upline information is helpful in case there are any contracting issues.

12. It will also ask for the agent's name - please use your first and last name as it appears on your contracting documents. This is how American Amicable will find your contract and connect to your application.

13. For applicant signature: There are two options, sign screen - this would only be used if you are writing the app in person and the client can physically sign your screen. The second option, EMAIL SIGNATURE would be used when writing an application virtually.

14. Steps for email signature: Click SEND EMAIL

The screenshot shows a web application titled 'Sign from Email'. The header text says: 'Use the form below to send an email to the insured. They will use their SSN to verify their identity and sign the application.' Below this, there is a section titled 'Sign from Email' with an envelope icon. This section contains a table with columns 'Signature', 'Email', and 'Status'. The 'Insured' row has a 'Send Email' button. Below this, there is a section for 'Agent Email (required)' with a text input field containing 'yln@abc.com' and a 'Save Agent Email' button. Below that is a button that says 'Click here to refresh the email status'. At the bottom, there is a section titled 'To change the signature method, use the button below' with a 'Change Signature' button. At the bottom right, there is a watermark that says 'Made with Tango.us'.

15. Enter clients email twice.

16. If the client did not receive the email, have them check their spam folder. You can also click Resend/Update to send again.

| Signature | Email             | Status |
|-----------|-------------------|--------|
| Insured   | lhaigood@aatx.com | Sent   |

17. Do not leave the screen. If you leave and come back you will have to start the entire application over again. To check and see if the client has signed and submitted you can "click here to refresh the email status."

Use the form below to send an email to the insured.  
They will use their SSN to verify their identity and sign the application.

### Sign from Email

| Signature | Email                         | Status     |
|-----------|-------------------------------|------------|
| Insured   | <a href="#">Resend/Update</a> | Email Sent |

Agent Email (required)

[Save Agent Email](#)

[Click here to refresh the email status](#)

To change the signature method, use the button below

[Change Signature Method](#)

18. Once the client opens the email, the status on the app will change to Email Viewed. Once signed, the app will update again (or you can refresh status.)

Use the form below to send an email to the insured.  
They will use their SSN to verify their identity and sign the application.

### Sign from Email

| Signature | Email                                           | Status       |
|-----------|-------------------------------------------------|--------------|
| Insured   | <a href="#">Resend/Update</a> lhaigood@aabc.com | Email Viewed |

Agent Email (required)

[Save Agent Email](#)

[Click here to refresh the email status](#)

To change the signature method, use the button below

[Change Signature Method](#)

19. This is the email the client will receive.



20. Once signed, the application can be submitted. Remember, filling out the application must happen from start to finish. You cannot leave or close the app and come back later and finish.

21. Once the application is submitted, the agent will receive an email from American Amicable (see example below). The agent should upload the PDF attached to the email as the application in Opt! ASAP, so that the application and contract can be connected.

This step is a requirement. Even if the agent has already submitted the contract to American Amicable. This step will still need to be completed so that American Amicable can connect the new business to their contract. This also allows for credit of the application on leaderboards.



22. Please note: the application will not be visible to the agent on the American Amicable site UNTIL the contract and application have been paired. If this does not happen within two to three business days please reach out. A copy of the full application does NOT need to be uploaded into Opt! once the agent has access.