

# Agent Portal Guide

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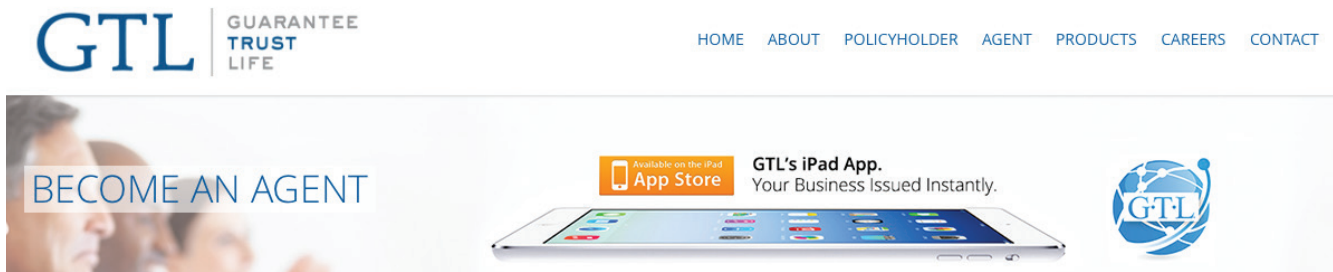
## Steps

1. Go to <http://www.gtlic.com>.
2. Click Agent on the top navigation then click on GTL Agent Login.
3. Enter your username and password. (The first time will be your agent code in both spots -i.e. (011XXXXX))
4. Click Login.
5. If you are prompted to change your password:
  - a. Enter your current password along with a new password and then click Submit.
  - b. If your password changed successfully, click Continue, otherwise please go back and make sure the fields were entered correctly.
6. You should now see a button that reads "Agent Portal". Click Agent Portal. A new window will open. You are now at the Agent Portal home page.

## Notes

- Your log in session will be timed out after 20 minutes of inactivity and you will be asked to login again.

## Screenshot



### AGENT LINKS

- [> Download Software](#)
- [> State Approval List](#)
- [> GTL Agent Login](#)

### GTL AGENT IPAD APP

Submit applications electronically from your customer's kitchen table. Video tutorials will show you how easy it is to use this app.

- [> GTL Agent iPad App Information](#)
- [> Download The App](#)

### Join Our Winning Team!

Thank you for your interest in learning more about how you can become an agent with Guarantee Trust Life Insurance Company. Established in 1936, Guarantee Trust prides itself on the family values on which we were built and the long tenured relationships we have with our Agent and Agency partners.

# OBTAIN QUOTE

## Steps

1. Click Quotes/Submit App link on the menu.
2. Select product and enter applicant information, then click Continue.
3. Select optional riders and enter coverage information, then click Continue.
4. You should now see the quote.
5. If you need to add a second applicant, please click the Add Second Applicant button and follow steps 1-4.

## Notes

- In the face amount field, enter numbers only, special characters are not accepted. For example, enter 15000, instead of \$15,000.
- Second applicant cannot be added for all products.

## Screenshot

The screenshot displays the 'G-TL Agent Portal' interface. At the top, there is a navigation bar with 'HOME', 'QUOTE/SUBMIT APP', 'SEARCH', and 'CONTACT' options. The 'QUOTE/SUBMIT APP' option is currently selected. Below the navigation bar, the 'Applicant Info' section contains the following form fields:

- Product Category: --Select Product Category-- (dropdown)
- Product: --Select Product-- (dropdown)
- Issue Date: 02/19/2014 (text input)
- First Name: (text input)
- Last Name: (text input)
- Birth Date: (text input)
- Age: (text input)
- Gender: --Select Gender-- (dropdown)
- Issue State: --Select State-- (dropdown)
- Under Writing Class: --Select UW Class-- (dropdown)

At the bottom right of the form, there are two buttons: 'Continue' and 'Reset'. Below the form, there is a footer with the text '©Copyright 2009 Guarantee Trust Life Insurance Company'.

## Steps

1. After obtaining a Quote you can print it.
2. Click the Print Quote button.
3. You should now see the Quote in a printable format.
4. Go to the File menu on your internet browser menu bar; then click Print.
5. Click the Back button on your Internet Explorer bar to return to the Quote page.

## Screenshot

The screenshot shows a web browser window with the URL <https://agentportal.gtlc.com/ReportPrintQuote.aspx?QuoteID=7X47ec96ZQJ=>. The browser tabs include "GTL - Agent Portal", "gtlic.com", and "Print Quote". Below the browser window, the page content features the GTL logo (GUARANTEE TRUST LIFE INSURANCE COMPANY) and the policy title "CP101 - CRIT ILLNESS 10YR 100% CI".

Prepared For: **Test Test**      Prepared By: **011PRT00AGENT DEMONSTRATION**  
 Birth Date: **10/25/1970**  
 State of Presentation: **IL**  
 Premium Mode: **Monthly PAC**

<u>Benefit and Rider Information</u>	<u>Premium</u>
CP101      CP101 - CRIT ILLNESS 10YR 100% CI	
CT101      CRITICAL, MAJOR AND TERMINAL ILLNESS	
CPFEE      POLICY FEE	63.90

# SAVE AND RETRIEVE QUOTE

## Steps

1. After obtaining a quote you can save it.
2. Click Save Quote. This will immediately save your quote.
3. To retrieve a saved quote, click Search.
4. The quote you just saved should be the very first one on the list. If not, find the quote you just saved.
5. Click Edit under the details column for that row; this will take you to the saved quote.

## Screenshot

Search Screen – Click Edit to complete a saved application.

The screenshot shows the G-TL Agent Portal search interface. At the top, there is a navigation bar with 'HOME', 'QUOTE/SUBMIT APP', 'SEARCH', and 'CONTACT'. Below this is a search criteria form with fields for Product Type, Agent, First Name, Last Name, Date Created (From), and Date Created (To). The search results are displayed in a table with columns: Product, Name, Date Created, Date Submitted, Status, Status Desc, Type, and Details. The table contains 15 rows of data, including various insurance products like CP101, AMEIA, AMEIB, AME1, CCFPA, GCALI, and MAP06. The bottom of the page features a footer with the copyright notice: ©Copyright 2009 Guarantee Trust Life Insurance Company.

Product	Name	Date Created	Date Submitted	Status	Status Desc	Type	Details
CP101 - CRIT ILLNESS 10YR 100% CI	Test Test	2/19/2014 11:46:24 AM				Q	<a href="#">Edit</a>
AMEIA - New 24Hr Accident Plan (25,000) Ind	test test	2/13/2014 2:50:32 PM				A	<a href="#">Edit</a>
AMEIB - New 24Hr Accident Plan (20,000) Ind	Kelly Emmerling	2/13/2014 1:43:16 PM				Q	<a href="#">Edit</a>
AME1 - 1st Gen Accident plan (10,000)(CT,FL,HI,KS,NV,SC)	test test	2/13/2014 1:33:22 PM				A	<a href="#">Edit</a>
AME1 - 1st Gen Accident plan (10,000)(CT,FL,HI,KS,NV,SC)	jan jjj	2/13/2014 1:07:46 PM				A	<a href="#">Edit</a>
CCFPA - Plan A = Critical Care (Applies to primary insured)	test test	2/6/2014 4:39:10 PM				Q	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	dd ssss	1/31/2014 10:31:50 AM				A	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	test test	1/30/2014 4:53:28 PM				Q	<a href="#">Edit</a>
MAP06 - ADVANTAGE PLUS	Test Test	1/28/2014 3:09:52 PM				A	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	Tom Jones	1/27/2014 9:11:40 AM	1/27/2014 9:20:00 AM	T	No Reason	A	PDF Pending
MAP06 - ADVANTAGE PLUS	Tom Jones	1/27/2014 9:11:40 AM	1/27/2014 9:20:00 AM	T	No Reason	A	<a href="#">View</a>
MAP06 - ADVANTAGE PLUS	rr rr	1/27/2014 9:05:14 AM				A	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	Tom Jones	1/27/2014 9:00:24 AM				Q	<a href="#">Edit</a>
MAP06 - ADVANTAGE PLUS	Tom Jones	1/27/2014 9:00:24 AM				Q	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	Tom Jones	1/22/2014 2:23:03 PM	1/22/2014 2:29:00 PM	P	Incomplete	A	PDF Pending

## Steps

1. After obtaining a quote, click the Fill Policy Application button.
2. Complete all applicable fields, then click Save and Continue.
3. You will come across coverage/premium questions, health questions, authorization, monthly premium payment plan, and more sections depending on the insurance product you selected. Complete all fields, and then click Save and Continue for each of these sections.
4. Next, if you answered yes to the replacement insurance question, and if the state you chose has a Replacement Form, you will see that now. Complete the form and then click Continue.
5. Depending on the state, you may see a Disclosure Form, or outline of coverage. If you do, complete this form and then click Continue.
6. You should now see a page titled "Consent to Electronic Transactions". Click the "I Accept" checkbox then click Submit.
7. You will see a thank you message along with the Policy Number. Any forms that must be provided to the applicant will appear in the next screen in a PDF format for your convenience to email, print, etc.

*Should you experience any difficulty, please [click here](#) or contact GTL Sales Support at 800-323-6907. Monday through Thursday 7:00am to 5:00pm Central Time or Friday 8:00am to 12:00pm Central Time.*

## Notes- Voice Verification Call

- When it's time to verify the sale, your applicant(s) will find the process simple and reliable. They can complete the verification call either before or after you enter the online e-Signature application.
- Keep in mind, however, that GTL will not begin underwriting the e-Signature application until the verification call has been completed.

## Screenshot

Policy Application Screen

The screenshot displays the 'GTL Agent Portal' interface for a policy application. The top navigation bar includes 'HOME', 'QUOTE/SUBMIT APP', 'SEARCH', and 'CONTACT'. The main content area shows the following details:

- Product:** CP101 - CRIT ILLNESS 10YR 100% CI
- Application Number:** 57151
- Applicant(s) Information:**
  - Last Name: Test
  - First Name: Test
  - M.I.: [ ]
  - Birth Date: 10/25/1970
  - Social Security #: [ ]
  - Sex: M
  - Age: 43
  - Height: [ ] Ft. [ ] In.
  - Weight: [ ]
  - Birth Place: [ ]
  - Occupation: [ ]
  - Duties: [ ]
  - Length of Current Employment: [ ]
  - Effective Date: [ ]
- Contact Information:**
  - Street Address (Currently residing): [ ]
  - City: [ ]
  - State: IL
  - Zip Code: [ ]
  - Day(Work) Phone (e.g., 8888888888): [ ]
  - Night/Home Phone (e.g., 8888888888): [ ]
  - Best Time to Call (e.g., 4-6 PM): [ ]
  - E-Mail Address: [ ]
- Applicant One Beneficiaries:**
  - Primary Beneficiary:**
    - Last Name: [ ]
    - First Name: [ ]
    - Relationship: [ ]
  - Contingent Beneficiary:**
    - Last Name: [ ]
    - First Name: [ ]
    - Relationship: [ ]

At the bottom right of the form, there are two buttons: 'Back' and 'Save and Continue'.

## Steps

1. After submitting an application, a PDF is generated with the information from the application.
2. Click Search.
3. The very first row should be for the application you just submitted. If not, use the Search function to find the row for your application with a status of "S" for submitted.
4. Click View on that row.
5. The PDF should now appear on the screen.
6. Click the Printer icon on the Menu bar on top.
7. When the Print dialog box appears, click OK.

## Screenshot

The screenshot displays the G-TL Agent Portal search results page. At the top, there is a navigation bar with links for HOME, QUOTE/SUBMIT APP, SEARCH, and CONTACT. Below this is a search criteria form with the following fields:

- Product Type: [None]
- Agent: 011PRT00 - AGENT DEMONSTRA
- First Name: [ ]
- Last Name: [ ]
- Date Created (From): 11/19/2013
- Date Created (To): 02/19/2014

Below the search criteria, there is a table of search results. The table has the following columns: Product, Name, Date Created, Date Submitted, Status, Status Desc, Type, and Details. The table contains 15 rows of application data.

Product	Name	Date Created	Date Submitted	Status	Status Desc	Type	Details
CP101 - CRIT ILLNESS 10YR 100% CI	Test Test	2/19/2014 11:46:24 AM				Q	<a href="#">Edit</a>
AMEIA - New 24Hr Accident Plan (25,000) Ind	test test	2/13/2014 2:50:32 PM				A	<a href="#">Edit</a>
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AME1 - 1st Gen Accident plan (10,000)(CT,FL,HI,KS,NV,SC)	jan jjj	2/13/2014 1:07:46 PM				A	<a href="#">Edit</a>
CCFPA - Plan A = Critical Care (Applies to primary insured)	test test	2/6/2014 4:39:10 PM				Q	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	dd ssss	1/31/2014 10:31:50 AM				A	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	test test	1/30/2014 4:53:28 PM				Q	<a href="#">Edit</a>
MAP06 - ADVANTAGE PLUS	Test Test	1/28/2014 3:09:52 PM				A	<a href="#">Edit</a>
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MAP06 - ADVANTAGE PLUS	rr rr	1/27/2014 9:05:14 AM				A	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	Tom Jones	1/27/2014 9:00:24 AM				Q	<a href="#">Edit</a>
MAP06 - ADVANTAGE PLUS	Tom Jones	1/27/2014 9:00:24 AM				Q	<a href="#">Edit</a>
GCALI - CHS Protection Plus - Individual	Tom Jones	1/22/2014 2:23:03 PM	1/22/2014 2:29:00 PM	P	Incomplete	A	PDF Pending

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