

# Impact Mobile Conservation and Mods



**American Income**  
**National Income**  
life insurance companies

Revised 7.05.22

☰

JUBREY, STEPHEN →

DASHBOARD

**My Schedule – Check Out of Every Appt** 0  
View appointments Scheduled

**View by Team**  
View in-home appointments for my team

**My Lead**  
View leads assigned to my account

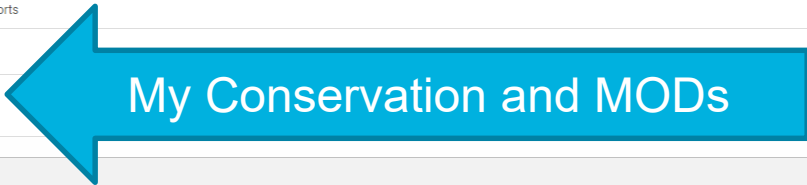
**Policy Search**  
Search policy holder coverage information

**My Report**  
View my Call Activity, Check-out and Production Reports

**Enter Today's Production**

**My Conservation and MODs** You have alerts 2956  
View tasks

**Search by Phone – Last 4 Digits**  
Phone No





## DASHBOARD

**My Schedule – Check Out of Every Appt**

View appointments Scheduled

**View by Team**

View in-home appointments for my team

**My Lead**

View leads assigned to my account

**Policy Search**

Search policy holder coverage information

**My Report**

View my Call Activity, Check-out and Production Reports

**Enter Today's Production**

**My Conservation and MODs**

View tasks

**Search by Phone – Last 4 Digits**

Phone No

Call



You have alerts **2956**

Your goal is to get the Red Indicator to 0 items daily.

Red Alert Indicator – 1. Newly Assigned Conservation Items

2. Denied Items from your Admin

3. If you're an MGA, then items shared with you if the item has exceeded the agency assigned MGA date



INBOX

Agent List:

Me

Status:

Assigned/Denied



Current/Overdue:

All



Agent List:

Me

Select Agent

BRANDT, KAITLYN

ELLER, SHANNA

ELLIS, MARISSA

JUBREY, STEPHEN

MCKEOWN, PATRICK

Me

MILLS, KRISTI

NELSON, MONDEE

OLVERA, JUAN

SPENCER, JESSE

Import Date

MGA Date

SGA Date

INC/NTO Date

Resolution Type

Comments

01/07/2020

01/14/2020

01/21/2020

02/06/2020

Requirements Submitted

mr agent you forgot your signature...

01/07/2020

01/14/2020

01/21/2020

02/06/2020

When you access the **Agent List** menu you will be defined as 'ME'. In this folder you can view all items assigned directly to you and any items shared with you to complete. Also if you are in a leadership position, any agent coded to you, you will be able to view what is in their folder from this list. SGA and SGA Proxies will be able to view all agents.



INBOX

Agent List:  
Me

Status:  
Assigned/Denied

Mod Type:  
Mod Type:

Current/Overdue:  
All

- All
- MODS
- Underwriting Bulletin
- Bad Check Alert
- Returned Items
- Lapse Notice
- Bad ACH
- Medical Alert
- Other Letter
- Renewals
- Report18 Non-Amendment Letters
- Miscellaneous Letters

Date	MGA Date	SGA Date	INC/NTO Date	Resolution Type	Comments
20	01/14/2020	01/21/2020	02/06/2020	Requirements Submitted	mir agent you forgot your signature...
20	01/14/2020	01/21/2020	02/06/2020		

When you access the **Mod Type** menu you will be able to Filter your specific conservation folders which will allow you to view just the items assigned to that folder.



INBOX

Agent List:

Me ▼

Mod Type:

All ▼

Show  entries

Policy Holder	Policy#	Import Date	MGA Date	SGA Dat
<a href="#">TUT KASONIY</a>	16174105	01/07/2020	01/14/2020	01/21/202
<a href="#">LEVERETT AMANDA</a>	13198010	01/07/2020	01/14/2020	01/21/202

Status:

Status:

Assigned/Denied ▼

- Assigned/Denied
- Assigned
- Submitted
- Denied
- Approved
- Completed
- Archived

Comments

mr agent you forgot your signature...

When you access the **Status** menu you will be able to Filter your items by where they are at in the process.

1. **Assigned**– Items assigned/shared with you to complete and submit
2. **Submitted**- This is notifying your local admin the action you took on an assigned item.

INBOX

Agent List: Me

Mod Type: All

Show 10 entries

Policy Holder	Policy#	Import Date	MGA Date	SGA Dat
<a href="#">TUT KASONIY</a>	16174105	01/07/2020	01/14/2020	01/21/202
<a href="#">LEVERETT AMANDA</a>	13198010	01/07/2020	01/14/2020	01/21/202

Status:

Status:

Assigned/Denied

Assigned/Denied

Assigned

Submitted

Denied

Approved

Completed

Archived

Comments

mr agent you forgot your signature...

3. **Denied-** If your local admin did not receive enough information to approve your item, they will return to you with a note stating what they need to approve.

4. **Approved-** Your provided your **local admin** with enough information to process your assigned item.

5. **Completed-** Your **local admin** has verified with Home Office that your Approved item has been accepted and processed.

Agent List: Me

Mod Type: All

Show 10 entries

Status: Assigned/Denied

Current/Overdue: All

Policy Holder	Policy#	Import Date	MGA Date	SGA Date	INC/NTO Date	Resolution Type	Comments
<a href="#">TUT KASONIY</a>	16174105	01/07/2020	01/14/2020	01/21/2020	02/06/2020	Requirements Submitted	mr agent you forgot your signature...
<a href="#">LEVERETT AMANDA</a>	13198010	01/07/2020	01/14/2020	01/21/2020	02/06/2020		

**Import Date-** Date received in Impact

**MGA Date-** Date assigned by SGA, when the item will Share in the MGA's inbox. In select agencies, this is the date the MGA or MGA Admin can recode if completed by the MGA or MGA Admin. See your local office for details.

**SGA Date-** Date assigned by SGA, when the item will Share with the SGA Admin. In select agencies, this is the date the SGA can recode if completed by the SGA or SGA Admin. See your local office for details.



INBOX

Agent List:  
Me

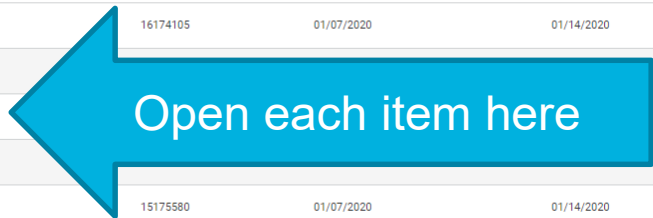
Status:  
Assigned/Denied

Mod Type:  
All

Current/Overdue:  
All

Show 10 entries

Policy Holder	Policy#	Import Date	MGA Date	SGA Date	INC/NTD Date	Resolution Type	Comments
<a href="#">TUT KASONIY</a>	16174105	01/07/2020	01/14/2020	01/21/2020	02/06/2020	Requirements Submitted	mr agent you forgot your signature...
<a href="#">LEVERETT AMANDA</a>				01/21/2020	02/06/2020		
<a href="#">WILLIAMS SABRINA</a>				01/21/2020	02/06/2020		
<a href="#">SIMS AMBER</a>				01/21/2020	02/06/2020		
<a href="#">BONNER ANTHONY</a>	15175580	01/07/2020	01/14/2020	01/21/2020	02/06/2020		
<a href="#">BRICE BRIAUNA</a>	15772804	01/07/2020	01/14/2020	01/21/2020	02/06/2020		
<a href="#">TAYLOR JODI</a>	15772805	01/07/2020	01/14/2020	01/21/2020	02/06/2020		



Open each item here

JONES AIDEN ✓  
Mobile: (952) 237-9305  
Home: (214) 650-6318  
  
5521 FORNEY RD  
DALLAS, TX, 752271201



Request Signed Amendment

### Policy Info

Policy#	<a href="#">16842614</a>
MOD Type	MODS
Import Date	05/13/2022
Complete By	03/24/2021

### Action

Needed	Prem Miscalc,Signed Amendment	
Primary Rated	No	<input type="text" value="My Conservation and M..."/>
Other	REDUCE FACE AMOUNT TO \$15,000 DUE TO EXISTING POL/CHILD/PARENT QAIR NOT REC	



1. Read and understand the Policy Information, Action, Amount, Rating, Misc and Notes.
2. Read the policy details and if available household policies

DETAIL

< INBOX Viewing 2 / 2

JONES AIDEN ✓  
Mobile: (952) 237-9305  
Home: (214) 650-6318

5521 FORNEY RD  
DALLAS, TX, 752271201

Call Mobile Call Home Submit Print Letter

Request Signed Amendment

**a)**

**3.**

Policy Info	
Policy#	<a href="#">16842614</a>
MOD Type	MODS
Import Date	05/13/2022
Complete By	03/24/2021
Action	
Needed	Prem Miscalc,Signed Amendment
Primary Rated	No <input type="text" value="My Conservation and M..."/>
Other	REDUCE FACE AMOUNT TO \$15,000 DUE TO EXISTING POL/CHILD/PARENT QAIR NOT REC

3. Print or Save attached letter and read it.

- a) If an attachment is supposed to be present, and it is not, then a request can be made using the request signed amendment button

## Request Signed Amendment

From stg\_donotreply@impactnotifications.com

To appdev2impact@devmail.com

CC

Policies  
16842614

Subject  
16842614-JONES, AIDEN

Body

Please send me an amendment  
Policy Owner Name:  
Agent Email Address:



1. Insert YOUR email here

Enter Owner Name and Agent email address to ensure swift response.  
Thank you



2. Send

Send

Cancel

1. In order to receive a response to your requested signed amendment, you must include your email address prior to sending
2. Send
3. **If this is not received in 24 hours, please reach out to your local admin asap.**

DETAIL

< INBOX

Viewing 2 / 2



JONES AIDEN

Mobile: (952) 237-9305

Home: (214) 650-6318

5521 FORNEY RD

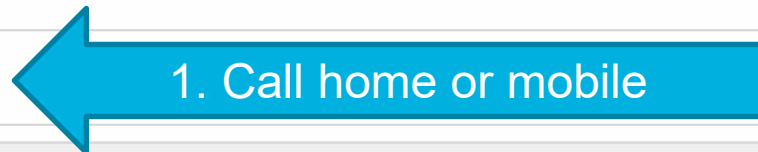
DALLAS, TX, 752271201



Call Mobile



Call Home



Print Letter

Notes/Call History

Add Note

01/04/2022 12:49 PM by Me: Call was made to PhoneNumber (952) 237-9305.

1. One Button Dialing through Impact Mobile.
2. All call history will be logged.

## Attachments

[Add Attachment](#)

test mod.pdf 01/04/2022 12:50 PM by Me

- All attachments will be logged.

## Add Attachment

Attachment: *(Please choose an attachment file and only '.jpeg', '.jpg', '.png', '.gif', '.bmp', '.pdf' formats are allowed.)*

No file chosen

- As many attachments can be added.
- Attachments must be saved and or converted to the noted file type above
- If your SGA requires all attachments are processed from a local level, they must be attached and submitted
- If you SGA allows your items to be uploaded to the ARC, it is suggested you attach the receipt from the ARC.

DETAIL

< INBOX

Viewing 2 / 2



JONES AIDEN

Mobile: (952) 237-9305

Home: (214) 650-6318

5521 FORNEY RD

DALLAS, TX, 752271201



Call Mobile



Call Home



Submit



Submit to Local Admin

- When Submitting your results of an Assigned conservation item, your submission will go directly to a local admin ONLY. Nothing will be sent to Home Office from Impact Mobile.

DETAIL

< INBOX

Viewing 2 / 2



JONES AIDEN

Mobile: (952) 237-9305

Home: (214) 650-6318

Resolution Select Resolution Status ▾

Select Resolution Status ▾

Select Resolution Status

Applicant Called 0800 Number

PolicyHolder Canceled

PolicyHolder Unreachable

Requirements Submitted

Note

Submit

Cancel



- Choose 1 of the 4 Resolution Status', then include a note to your admin for each item.
- For Example:
  - **Applicant Called 800 Number-** Note: contacted applicant and confirmed they contacted the home office, answered questions and completed the request
  - **Policyholder Canceled-** Note: Applicant believed rating was to expensive. Applicant believed counteroffer was to low.



DETAIL

< INBOX

Viewing 2 / 2



JONES AIDEN

Mobile: (952) 237-9305

Home: (214) 650-6318

Resolution Select Resolution Status ▾

Select Resolution Status ▾

Select Resolution Status

Applicant Called 0800 Number

PolicyHolder Canceled

PolicyHolder Unreachable

Requirements Submitted

Note

Submit

Cancel

- Choose 1 of the 4 Resolution Status', then include a note to your admin for each item.
- For Example:
  - **Policyholder Unreachable-** Note: Attempted all provided phone numbers multiple times, looked up on whitepages.com, attempted a door knock and client appears to have moved
  - **Requirements Submitted-** Note: Ok to draft, spoke to husband Joe. Obtained signed amendment/RT-99 see attachment

INBOX

Agent List:

Me ▼

Mod Type:

MODS ▼

Show  entries

Status:

Assigned/Denied ▼

Assigned/Denied

Assigned

Submitted

Denied

Approved

Completed

Archived

Policy Holder	Policy#	Import Date	MGA Date	SGA Date	INC/NTD Date	Resolution Type	Comments
---------------	---------	-------------	----------	----------	--------------	-----------------	----------

Once an Item has been submitted you can follow its Status through the remainder of the process.

- **Submitted-** sent results of an assigned item to the local admin for reporting and or processing.
- **Denied-** Local admin did not receive the necessary information for reporting and or processing.
- **Approved-** Local admin received enough information to complete the reporting and or processing.
- **Completed-** The local admin has marked item completed because
  1. There are no other actions to take on that item. IE Cancelation or unable to reach
  2. The Home office has moved the status to Normal Premium Paying

INBOX

Agent List: Me

Mod Type: MODS

Show 10 entries

Status: Assigned/Denied

- Assigned/Denied
- Assigned
- Submitted
- Denied
- Approved
- Completed
- Archived

Policy Holder	Policy#	Import Date	MGA Date	SGA Date	INC/NTD Date	Resolution Type	Comments
---------------	---------	-------------	----------	----------	--------------	-----------------	----------

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INBOX

Agent List:

Me ▼

Status:

Assigned/Denied ▼

Mod Type:

All ▼

Current/Overdue:

All ▼


Show  entries


Policy Holder	Policy#	Import Date	MGA Date	SGA Date	INC/NTD Date	Resolution Type	Comments
<a href="#">TUT KASONIY</a>	16174105	01/07/2020	01/14/2020	01/21/2020	02/06/2020	Requirements Submitted	mr agent you forgot your signature...
<a href="#">LEVERETT AMANDA</a>	13198010	01/07/2020	01/14/2020	01/21/2020	02/06/2020		
<a href="#">WILLIAMS SABRINA</a>	14471256	01/07/2020	01/14/2020	01/21/2020	02/06/2020		
<a href="#">SIMS AMBER</a>	14552523	01/07/2020	01/14/2020	01/21/2020	02/06/2020		
<a href="#">BONNER ANTHONY</a>	15175580	01/07/2020		01/21/2020	02/06/2020		
<a href="#">BRICE BRIAJUNA</a>	15772804	01/07/2020		01/21/2020	02/06/2020		
<a href="#">TAYLOR JODI</a>	15772805	01/07/2020			02/06/2020		
<a href="#">BRICE JAYLEN</a>	15772806	01/07/2020	01/14/2020		02/06/2020		
<a href="#">BRICE JORDAN</a>	15772807	01/07/2020	01/14/2020				
<a href="#">BRICE NYLA</a>	15772808	01/07/2020	01/14/2020	01/21/2020			



Showing 1 to 10 of 2,954 entries

INBOX

 View All Agents

Associate	Current	Overdue	Total
 JUBREY STEPHEN J (SGA-MGA)	0	2954	2954

Showing 1 to 1 of 1 entries

The Summary Tab will give you the ability to account for all Current and overdue items assigned with a total.

# IMPACT My Conservation and Mods

Expand/Minimize

	Current	Overdue	Total
EPHEN J (SGA-MGA)	0	2954	2954

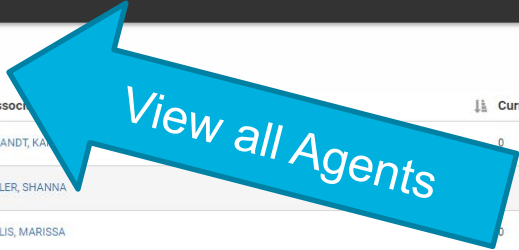
Folders	Number of items in the folders
MODS	0
Underwriting Bulletin	42
Bad Check Alert	139
Returned Items	88
Lapse Notice	392
Bad ACH	191
Medical Alert	0
Other Letter	2101
Renewals	0
Report18 Non-Amendment Letters	0
Miscellaneous Letters	1

Showing 1 to 1 of 1 entries

The Expanded Menu will allow you to see each folder and the items in each folder. When the folder or the amount is selected, those items will be filtered to your Inbox.

INBOX

View All Agents



Assoc	Current	Overdue	Total
BRANDT, KARA	0	286	286
ELLER, SHANNA	0	250	254
ELLIS, MARISSA	0	220	220
JUBREY STEPHEN J (SGA-MGA),	0	2954	2954
JUBREY, STEPHEN	0	63	63
MCKEOWN, PATRICK	7	451	458
MILLS, KRISTI	0	163	163
NELSON, MONDEE	0	52	52
OLVERA, JUAN	0	1068	1068
SPENCER, JESSE	0	255	255

Showing 1 to 10 of 10 entries

When the **'View All Agents'** tab is selected, if you are in a leadership position, you will be able to view all agents assigned to your hierarchy. If you are a designated SGA proxy, you will see the entire hierarchy.

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<https://www.facebook.com/AIL.NILICO.AgencyDivision/>

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<https://www.instagram.com/ail.nilico.agencydivision/>

**Best Practices for Technical Support**

[https://drive.google.com/file/d/1jrI7WICyAx90FV5uj1eN9fd\\_AbtbaPgd/view?usp=sharing](https://drive.google.com/file/d/1jrI7WICyAx90FV5uj1eN9fd_AbtbaPgd/view?usp=sharing)