



DATE: July 29, 2019

TO: Broker General Agencies, Office Administrators, and Technical Staff

SUBJECT: Streamline Your Business with Automated Delivery of Forms & Underwriting Requirements

Category	
<input checked="" type="checkbox"/>	Administration
<input type="checkbox"/>	Compliance
<input type="checkbox"/>	Marketing
<input type="checkbox"/>	Product
<input type="checkbox"/>	Risk Selection
<input type="checkbox"/>	Miscellaneous

Enhanced eCapabilities Now Available on Pacific Life's eRequirements Platform

Pacific Life is committed to being a leader in innovative technology by seeking ways to develop digital enhancements that streamline processes and increase speed of service. As part of these efforts, Pacific Life launched eRequirements, available on our inhouse eDelivery platform. If elected, eRequirements automatically delivers forms and underwriting requirements electronically to Broker General Agencies (BGAs), producers, and consumers.

eRequirements allows users to:

- Review forms (Underwriting Supplements, HIV Consent, Replacement, and Disclosures) and provide answers to outstanding questions
- Electronically sign necessary forms
- Route documents between the BGA, Producer, Consumer, and Pacific Life electronically
- Opt in to have eRequirements delivered as a default automatically or opt in on a case-by-case basis for more control

Benefits of using eRequirements:

- Reduce turnaround time for completing forms
- Reduce turnaround time for underwriting questions
- Automated notifications are built into the tool for all parties involved

This feature will be available on cases that have the following information:

- Proposed Insured's Email Address, Social Security Number, and Zip Code
- Proposed Owner's Email Address, Social Security Number, and Zip Code
- Producer's Email Address
- BGA's Email Address

Access the Producer Bay website by clicking on the link: <http://producerbay.pacificlife.com/>

BGA and Producer's Dashboard View of eRequirements

The eRequirements dashboard is accessible through the eDelivery link in ProducerBay or through the link provided in an email notification upon registration.

If you would like to utilize eRequirements, please contact Pacific Life's New Business team at (844) 276-5759 or LynLifeNB@PacificLife.com for assistance in registering for eRequirements and for further information.

After your registration is completed, the eRequirements dashboard is accessible through the eDelivery link in ProducerBay or through the link provided in an email notification upon registration.

The Producer Bay website can be accessed by clicking on the link: <http://producerbay.pacificlife.com/>. If this is your first time accessing ProducerBay, you can register through the Login page. You'll need to enter either your Social Security Number (SSN) or Taxpayer Identification Number (TIN), plus your Last Name, Producer Code (SAID), and/or Insurance License Code. You may also contact Pacific Life's support team at (844) 238-4872, Option 1 or LynDistributorServices@PacificLife.com for assistance in starting the journey to easier case management of your Pacific Life business.

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BGA P0007 BP
Distributor

ePolicy eRequirements

Search by Policy# or Proposed Insured first or last name

Filter

Policy#	Created Date/Last Updated	Proposed Insured	Pending Action
2L00000000	Apr 10, 2019	JOHN SMITH TEST.TEST@PACIFICLIFE.COM	Total Count Pending: 4 Producers: 3 Proposed Insured: 1

View eRequirements Send to Producer View Activity History Resend Email

Consumer's View of eRequirements

Consumers can access eRequirements through a link provided in an email notification.

PACIFIC LIFE | e-Delivery

JOHN SMITH Insured

Case Details Summary

Proposed Insured JOHN SMITH

Case Number 2L00000000

Plan Name PL PROMISE TERM 20

Please review and complete questions and eForms

Outstanding eForms

- AVIATION SUPPLEMENT
- REPLACEMENT NOTICE

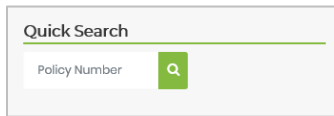
Outstanding Questions(2)

Continue Finish Later

Not Registered for eRequirements Yet?

If you have not registered for eRequirements, you are still able to send requirements electronically to the eDelivery tool.

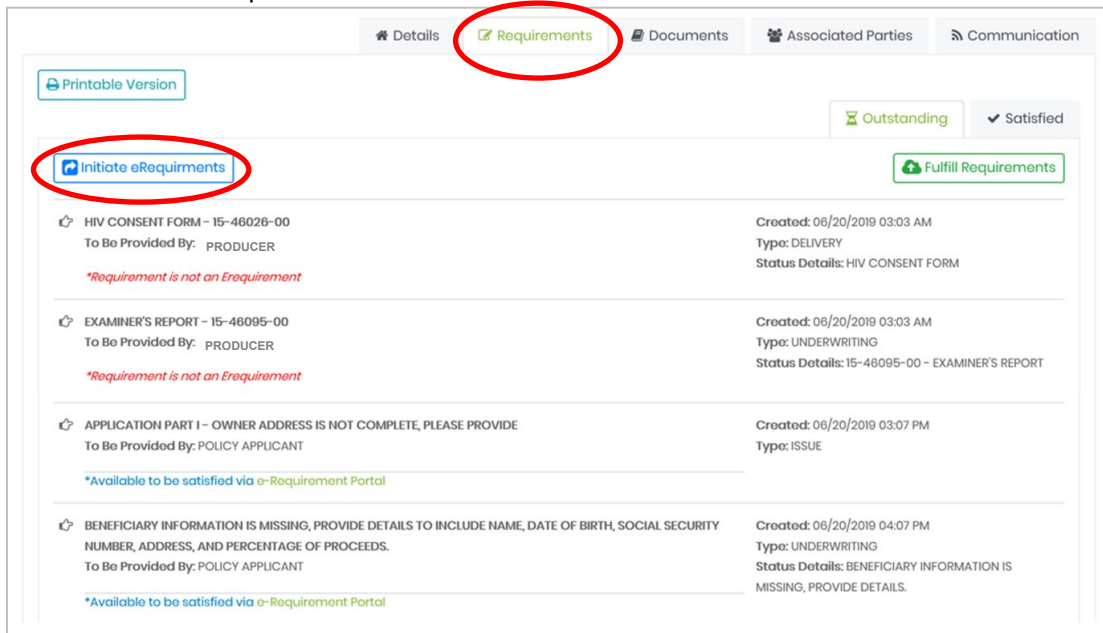
1. Search and locate the case on ProducerBay.



Quick Search

Policy Number

2. Click on the Requirements tab.
3. Click on Initiate eRequirements.



Details Requirements Documents Associated Parties Communication

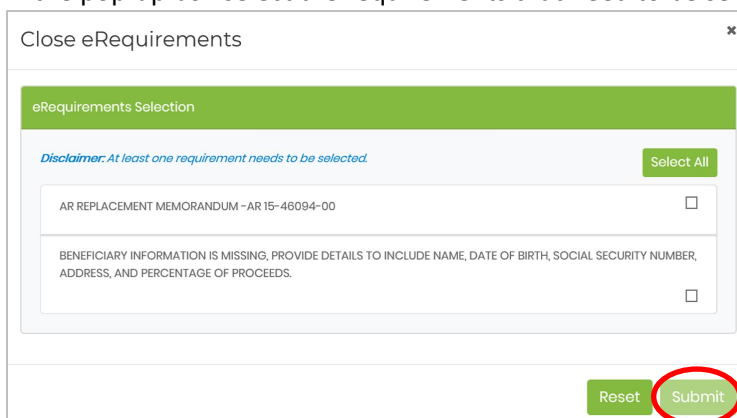
Printable Version

Outstanding Satisfied

Initiate eRequirements Fulfill Requirements

HIV CONSENT FORM - 15-46026-00 To Be Provided By: PRODUCER <i>*Requirement is not an Erequirement</i>	Created: 06/20/2019 03:03 AM Type: DELIVERY Status Details: HIV CONSENT FORM
EXAMINER'S REPORT - 15-46095-00 To Be Provided By: PRODUCER <i>*Requirement is not an Erequirement</i>	Created: 06/20/2019 03:03 AM Type: UNDERWRITING Status Details: 15-46095-00 - EXAMINER'S REPORT
APPLICATION PART I - OWNER ADDRESS IS NOT COMPLETE, PLEASE PROVIDE To Be Provided By: POLICY APPLICANT <i>*Available to be satisfied via e-Requirement Portal</i>	Created: 06/20/2019 03:07 PM Type: ISSUE
BENEFICIARY INFORMATION IS MISSING, PROVIDE DETAILS TO INCLUDE NAME, DATE OF BIRTH, SOCIAL SECURITY NUMBER, ADDRESS, AND PERCENTAGE OF PROCEEDS. To Be Provided By: POLICY APPLICANT <i>*Available to be satisfied via e-Requirement Portal</i>	Created: 06/20/2019 04:07 PM Type: UNDERWRITING Status Details: BENEFICIARY INFORMATION IS MISSING, PROVIDE DETAILS.

4. In the pop-up box select the requirements that need to be sent electronically.



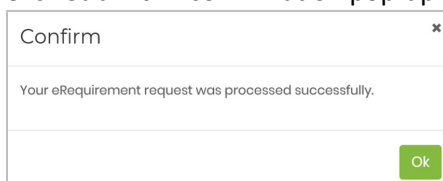
Close eRequirements

eRequirements Selection

Disclaimer: At least one requirement needs to be selected.

AR REPLACEMENT MEMORANDUM - AR 15-46094-00	<input type="checkbox"/>
BENEFICIARY INFORMATION IS MISSING, PROVIDE DETAILS TO INCLUDE NAME, DATE OF BIRTH, SOCIAL SECURITY NUMBER, ADDRESS, AND PERCENTAGE OF PROCEEDS.	<input type="checkbox"/>

5. Click Submit. A confirmation pop-up box will appear.



Confirm

Your eRequirement request was processed successfully.

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Life insurance is subject to underwriting and approval of the application and will incur monthly policy charges.

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4 of 4