

Assurity®

Worksite Proposal System Quick Reference Guide



Overview

Assurity's Worksite Proposal System can be accessed using your AssureLINK login credentials on AssureLINK (coming soon) or directly at wps.assurity.com.

The screenshot shows the Assurity Worksite Proposal System login page. At the top is a red header with the Assurity logo. The main content area is white and contains the following sections:

- Worksite Proposal System**: A section describing the system's capabilities, including creating customized proposals and downloading PDFs. It includes instructions to use AssureLINK account credentials for login.
- Login**: A section with two input fields: "Username" (containing "ABC123") and "Password" (masked with dots). Below the fields is a red "LOG IN" button.
- Need Help?**: A light blue box containing contact information for Agent Support, including the phone number 800-869-0355.
- For additional product resources and other tools**: A section with links to "Assurelink" and "online product training videos".
- Don't have an AssureLINK account?**: A section with links for "Create an Account" and "Forgot Password?".

Upon login, you are directed to the **Proposal Management** screen, where you will find all the proposals you have initiated.

The screenshot shows the Assurity Proposal Management interface. At the top, there is a navigation bar with the Assurity logo and links for Proposal Management, New Proposal, and Logout. Below the navigation bar, there is a search section with 'Simple Search' and 'Advanced Search' tabs, and a search input field with a magnifying glass icon. The main content area is titled 'Recent Proposals (showing 1 - 10 of 5 results)' and includes an 'EXPORT RESULTS' button. Below this is a table with columns for ID, Created, Product, Employer, SIC Request, State, and Status. The table contains five rows of proposal data. At the bottom of the table, there are navigation controls including a red square with the number '1' and arrows for page navigation.

ID	Created	Product	Employer	SIC Request	State	Status
123889	11/13/20, 10:50 AM	CLHI	ABC Corporation	No	NE	Incomplete Last Changed: 11/13/20, 10:50 AM
123888	11/13/20, 10:50 AM	CLHI	ABC Corporation	No	NE	Agent Generated Proposal Last Changed: 11/13/20, 10:50 AM
123887	11/13/20, 10:48 AM	CLHI	ABC Corporation	No	NE	Submitted for Approval Last Changed: 11/13/20, 10:50 AM
51932	6/5/20, 5:40 PM	HI	ABC	No	NE	Approved for Enrollment Last Changed: 6/5/20, 5:41 PM
41723	5/5/20, 4:27 PM	HI	ABC	No	NE	Approved for Enrollment Last Changed: 5/6/20, 4:07 PM

To begin a proposal, select **“New Proposal”** from the menu bar.

This screenshot is similar to the one above, showing the Assurity Proposal Management interface. The 'New Proposal' link in the top navigation bar is circled in red, indicating the action to be taken to start a new proposal.

Complete all required employer information to ensure product and plan design availability. If you're unsure of the correct **Standard Industry Classification**, use the SIC search functionality to find the best fit. There will be an opportunity to verify it later.

Assurity Proposal Management New Proposal Logout

1 Agent & Employer Information 2 Product Selection 3 Confirmation

Agent Information
Agent Profile (Enter keywords to search)
DAJR - ASSURITY LIFE INSURANCE COMPANY
Name*
ASSURITY LIFE INSURANCE COMPANY
Address
PO BOX 82533
City
LINCOLN State Zipcode 68501
Phone Number
000000000

Employer Information
Employer Name *
Address *
City * State * Zipcode
Group Type * Standard Employer Payroll Frequency * Choose Fr... Years in Business * Choose Ye...
Number of Eligible Employees * SIC Code *
Issue State *
This issue state selection should reflect the situs state of the employer which will then govern the proposal and rates presented. However, employers with employees who are residents of Washington and/or New Mexico will also require state specific Washington and/or New Mexico proposals and rates for use with employees with residence in those states.

NEXT

Navigating off the **Agent and Employer information** screen creates a record of the proposal for future access. **Note:** Navigating through a proposal creation can be done by clicking “**Next**” in the lower righthand corner, or by sequentially stepping through the navigation bar above.

Assurity Proposal Management New Proposal Logout

1 Agent & Employer Information 2 Product Selection 3 Confirmation

Agent Information
Agent Profile (Enter keywords to search)
OAJR - ASSURITY LIFE INSURANCE COMPANY

Name *
ASSURITY LIFE INSURANCE COMPANY

Address
PO BOX 82533

City
LINCORN State Zipcode
68501

Phone Number
000000000

Employer Information
Employer Name *
ABC Corporation

Address *
123 Company Way

City *
Lincoln State *
Nebraska Zipcode
68001

Group Type *
Standard Employer Payroll Frequency *
BI-Weekly Years in Business *
1 Year or ...

Number of Eligible Employees *
400 SIC Code *
639999

Issue State *
Nebraska

This issue state selection should reflect the situs state of the employer which will then govern the proposal and rates presented. However, employers with employees who are residents of Washington and/or New Mexico will also require state specific Washington and/or New Mexico proposals and rates for use with employees with residence in those states.

NEXT

Once product selections are made, create your own unique plan designs or simply pick from one of our popular off-the-shelf options.

Assurity Proposal Management New Proposal Logout

1 Agent & Employer Information 2 Product Selection 3 Critical Illness 4 Hospital Indemnity 5 Confirmation

Product Selection
Product

- Accident Expense Insurance
- Critical Illness
- Hospital Indemnity
- Disability Income
- Whole Life

BACK NEXT

Assurity Proposal Management New Proposal Logout

1 Agent & Employer Information 2 Product Selection 3 Critical Illness 4 Hospital Indemnity 5 Confirmation

Hospital Indemnity (Policy 2 of 2)

Commissions *
Heaped

Rate Type *
Composite

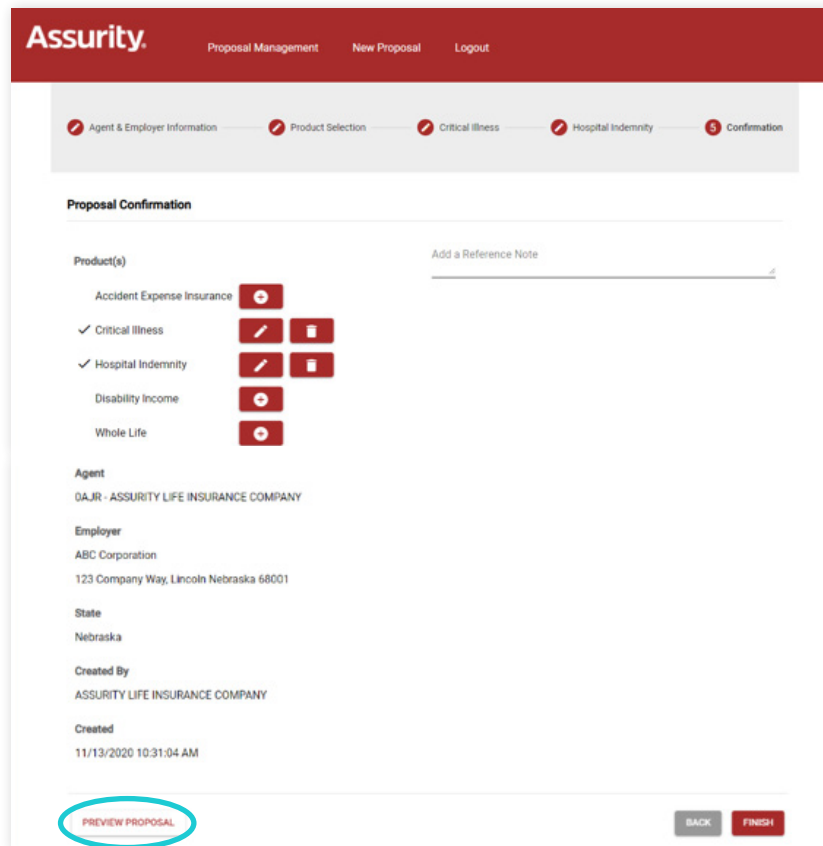
Admission Options (HSA Co)
 HI Admission (Unit Value =
Benefit based on number of units selected.
Plan 1 Units *
2.0 Plan 2 Units
None Plan 3 Units
None

Flexible
Tier 1
Tier 2
Tier 3
Basic Care
Prime

Underwriting Type *
Guaranteed Issue (10+ eligi...

Allowable Coverage Tiers
 Employee
 Employee and Spouse
 Employee and Children
 Family

The **Proposal Confirmation** page allows you to preview the PDF of your proposal. You can also **“Finish”** it, but that is not recommended until your proposal is just the way you want it because **“Finish”** prevents any future editing. Rest assured, your proposal is saved in an **“Incomplete”** status and available for future access and editing through Proposal Management.



You'll find all the proposals you've initiated on the **Proposal Management** page. The grid provides basic summary information for each proposal; additional details are displayed by clicking the arrow icon at right.

The screenshot shows the Assurity Proposal Management interface. At the top, there is a navigation bar with the Assurity logo and links for Proposal Management, New Proposal, and Logout. Below this is a search section with 'Simple Search' and 'Advanced Search' tabs, a search input field, and a search button. The main content area is titled 'Recent Proposals (Showing 1 - 10 of 5 results)' and includes an 'EXPORT RESULTS' button. A table displays the following data:

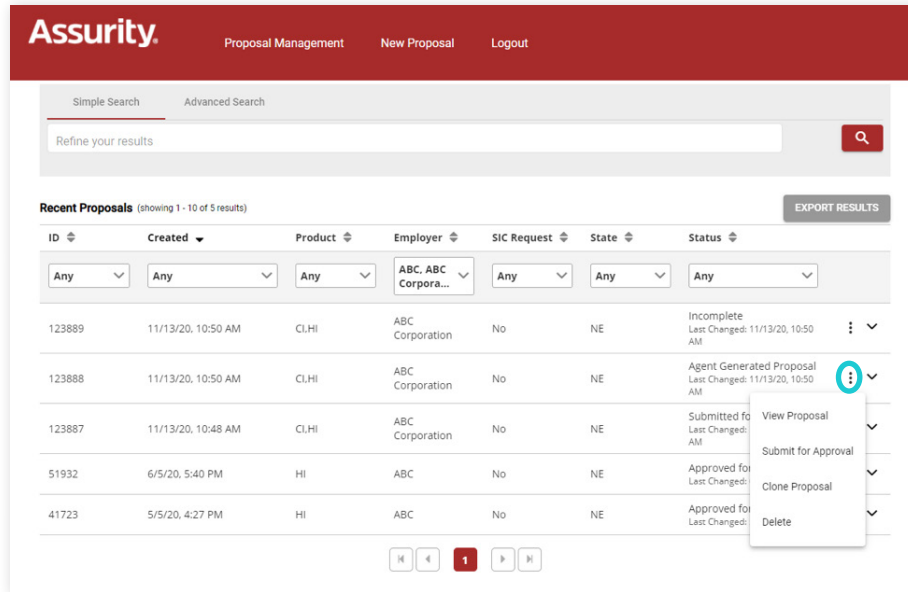
ID	Created	Product	Employer	SIC Request	State	Status
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At the bottom of the table, there are navigation controls including a red button with the number '1' and arrows for page navigation.

Proposal statuses include:

- **Incomplete** – you're still working on it and haven't yet taken the "Finish" action.
- **Agent Generated** – it's final, "Finish" action has been taken, and not available for editing.
- **Submitted for Approval** – your finished proposal was submitted and is awaiting an Approver Note from Assurity's Worksite Team indicating approval action.
- **Approved for Enrollment** – the proposal is in good order and approved by our Worksite Team for use as configured for your client's enrollment.

Various actions are available for each proposal based on its status. Available actions are accessed by clicking the menu icon at right.



Available actions based on status are as follows:

- **Incomplete** – Resume, Submit to Verify SIC, or Delete
- **Agent Generated Proposal** – View Proposal, Submit for Approval, Clone Proposal, or Delete
- **Submitted for Approval** – View Proposal, Clone Proposal, or Delete
- **Approved for Enrollment** – View Proposal, Clone Proposal, Mark as Sold



Why we're different

Mutual strength

For over 130 years, our financial strength has helped people support one another through difficult times.

A force for good

As a Certified B Corporation, we work toward positive impacts for employees, communities and the environment.



Personal service

Get the customer service you need from real, responsive and efficient people in our Lincoln, Nebraska headquarters.

Worksite Product Sales

800-276-7619

Ext. 8964

Find out more

[assurity.com](https://www.assurity.com)



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