

# SECURIAN EPOLICY INSTRUCTIONS

Access the **Life Insurance Policy Documents tool** on the Securian Advisor website. Here you will find a copy issued life insurance policy and delivery documents (along with many other correspondences such as billing notices, annual policy reviews, etc.). These online documents are updated daily. For more information: <https://advisor.securian.com/content/advisor/master/en/news/client-documents-are-available-online-.html>

## How to access

1. Log in to the Securian Advisor website
2. Click on 'Client Servicing' tab
3. Under 'Policy & contract documents' you'll find 'Life Insurance Policy documents'

The screenshot shows the Securian Financial website interface. The top navigation bar includes 'MY BUSINESS', 'SALES & MARKETING', and 'CLIENT SERVICING'. The 'CLIENT SERVICING' tab is selected. Below the navigation, there are three main sections: 'Account Access', 'Servicing forms', and 'Tools & systems'. Under 'Servicing forms', the 'Policy & contract documents' section is expanded, and 'Life insurance policy documents' is highlighted with a yellow box and a mouse cursor.

4. Search for the 'Document Category' of 'Policy Packet'

The screenshot shows the 'Policy Documents' search results page. The search parameters are set to 'Policy Packet'. The results table shows two records for 'Policy Packet' documents created on 04/14/2020 for client WARD, CLAUDE. The table has columns for History, Creation Date, Document Category, Document Type, Servicing Advisor Code, and Client Name.

History	Creation Date	Document Category	Document Type	Servicing Advisor Code	Client Name
<input checked="" type="checkbox"/>	04/14/2020	Policy Packet	<a href="#">Policy PDF</a>	1247400	WARD, CLAUDE
<input checked="" type="checkbox"/>	04/14/2020	Policy Packet	<a href="#">Policy PDF</a>	1247400	WARD, CLAUDE

\* Pending documents are unavailable until processing is complete, usually within 2 hours.  
Documents created within the last 2 years will be available for viewing. Policy Packets are only available for the first 6 months after creation.

**Additional items to note:**

- Once the Securian Financial New Business team has issued the policy, it will load to the website overnight and will be available the following business day.
- The policy will be viewable for 6 months due to the confidential medical information.
- The life insurance policy document category is 'policy packet' and the document type is 'policy pdf'.
- Should a policy be reissued, the old version will be removed from the tool and will be replaced with the updated policy.
- A cover sheet will accompany the policy outlining options to use the PDF to facilitate delivery of the policy. Note: we are not replacing our 'normal' delivery options of physical mail or ePolicy Delivery. This is an additional way to access the policy and delivery documents.
- Currently, the policy is only viewable by financial professionals and their support staff. It is not viewable for clients on eSC or MyAccount.