



**PACIFIC LIFE**

# Pacific Life eDelivery

January 2018



# What is PL eDelivery?

PL eDelivery is our new inhouse eDelivery platform to deliver policies electronically to our customers.

Customers are able to:

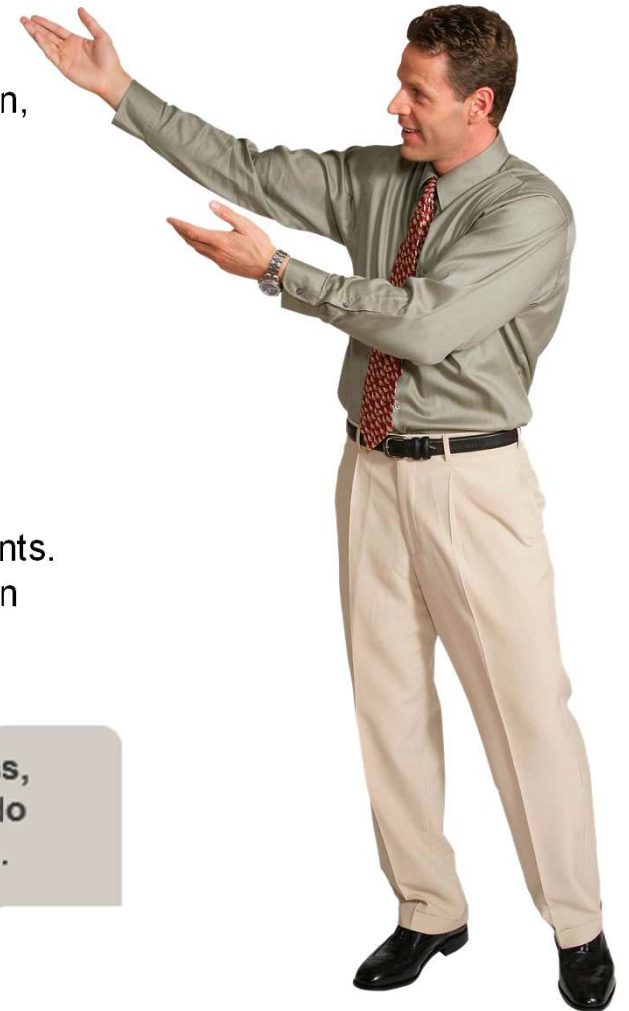
- Review policy package, delivery requirements and payment plan,
- Complete the payment plan for initial premium and recurring,
- eSign all necessary documents,
- Return Delivery Requirements,
- Minimize re-issue delays,
- Request delivery extensions electronically.

By using the inhouse PL eDelivery system, we are able to:

- Cut cost of mailing a physical policy,
- Reduce cycle time for delivery of policy and delivery requirements.
- Reduce cycle time in receiving eSigned delivery requirements in house.

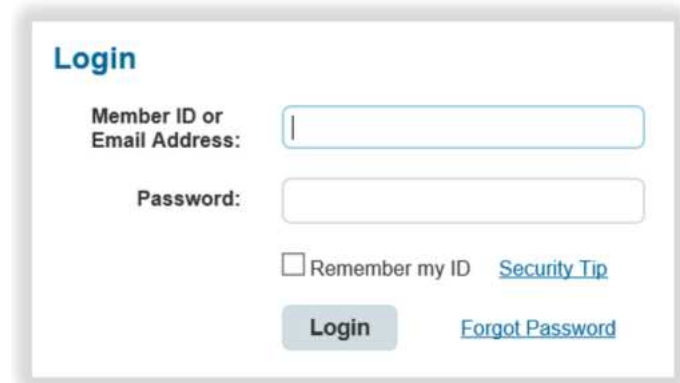


**Throughout the e-Delivery process, all participants are notified of to-do tasks, status and issues via email.**



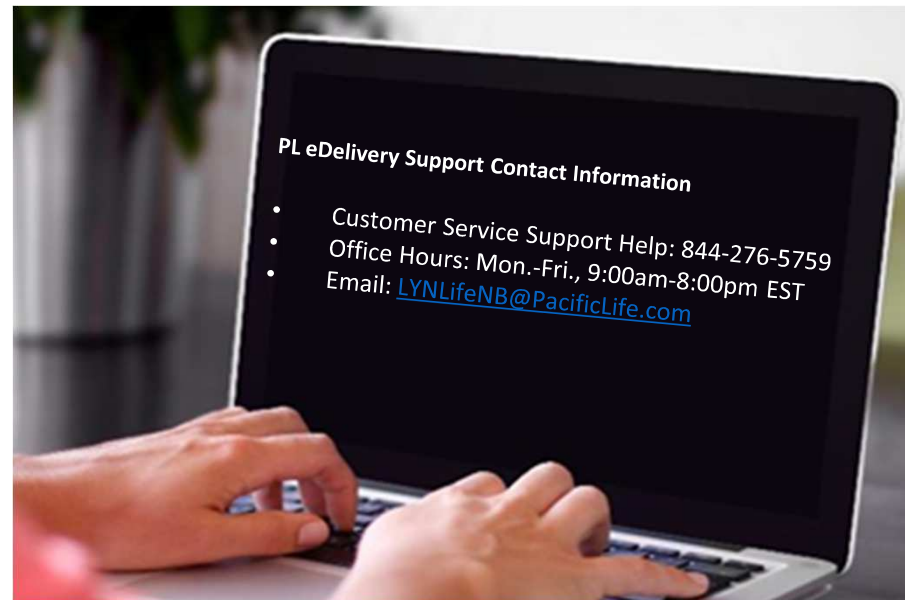
# PL eDelivery Login Page

- Log in with Producer Bay ID/Password
- Other login details:
  - Remember my ID:
  - Security Tip:
  - Forgot Password



The screenshot shows a login form with the following elements:

- Login** (Section Header)
- Member ID or Email Address:** Input field
- Password:** Input field
- Remember my ID [Security Tip](#)
- Login** (Button)
- [Forgot Password](#) (Link)



# UI Policy View Details

Filter ▾

Policy# ▲▼	Expiration Date ▼	Insured	Policy Status	Party Status	
2L00274390	Feb 12, 2018	VNDJLMHQZFRWIIVJLDRN ELIZABETH.MANER@PACIFICLIFE.COM	Pending	<p>Not Started</p> <p>Not Started</p> <p>Not Started</p> <p>Distributor      Producer      Insured</p>	<p>View Details</p> <p>View History</p>

Showing 1 - 1 of 1 items.

« « 1 » »

# Filter Results

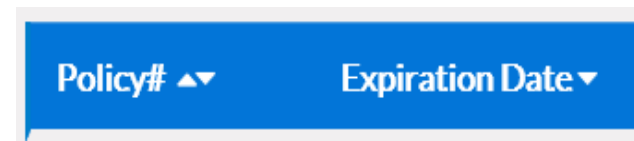
- Filter results methods:

- Completed
- NTO
- Pending
  - Notified
  - Not Started
  - In Progress
- Reissue Requested
- Void



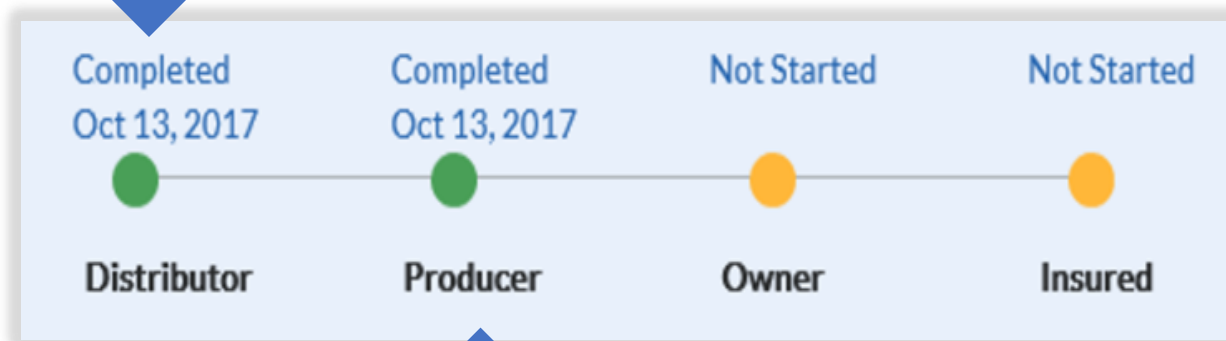
- Sorting by Policy Number or Expiration Date:

- Click the up ▲ or down ▼ arrows



# Party Status

Distributor has delivered the policy to the Producer



Producer has delivered the policy to the Owner

# Distributor View

E-deliver to Producer

Reissue Request

Decline Offer

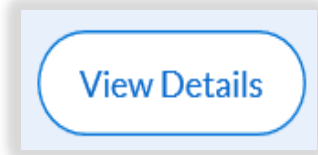
Re-send

Request Delivery Extension

Reissue Request (Click Submit when done)	Decline Offer (Click Submit when done)	Re-send (Window shows email will be re-sent to)	Request Delivery Extension
<p>Select reason for re-issue:</p> <ul style="list-style-type: none"> <li>• Reissue as paper</li> <li>• Reconsideration of offer</li> <li>• Policy Effective date</li> <li>• Riders/Benefits</li> <li>• Owner</li> <li>• Beneficiary</li> <li>• Face Amount</li> <li>• Plan of Insurance/Product</li> <li>• Other</li> </ul> <p>Description for the re-issue (free form box)</p>	<p>Select reason for decline:</p> <ul style="list-style-type: none"> <li>• Decline eDelivery</li> <li>• Coverage not as expected</li> <li>• Too Expensive</li> <li>• No Longer Interested</li> <li>• Service related issue</li> <li>• Other</li> </ul> <p>Description for the re-issue (free form box)</p>	<p>Resend available once policy is released to the producer.</p> <ul style="list-style-type: none"> <li>• Resend email without reissuing the policy</li> </ul>	<p>The following pop-up will display the following type:</p> <ul style="list-style-type: none"> <li>• Request Delivery Extension can only be requested once. Once request is submitted to Pacific Life, you may not be able to perform any action until decision is made. Are you sure you want to continue? (Click <b>Submit</b> to confirm.)</li> </ul>

# Distributor View- Policy Information

Click on **View Details** button to view more details about the policy



Policy Information

[Reissue Request](#)
[Decline Offer](#)
[Re-send](#)
[Request Delivery Extension](#)
[Back to Dashboard](#)

**Status - PENDING**

Policy No#	Expiration Date	Insured	Completed Dec 05, 2017	Completed Dec 05, 2017	In Progress Dec 06, 2017
2L00258860	Jan 09, 2018	UMZZEGEYZPO JNIGVOG KRASHNA.BANDAWAR@PACIFICLIFE.COM	Distributor	Producer	Insured

**Policy Summary**

Policy Package.pdf  
\*Unable to open PDF. Please disable your adblocker\*

Policy number	2L00258860
Policy Plan Name	PL Promise Term 10
Issue Age	29
Face Amount	\$300,000.00
Rate Class	Preferred Best No Nicotine use
Payment Frequency	Monthly
Annual Premium Amount	\$134.94
Monthly Premium Amount	\$11.47
Quarterly Premium Amount	\$35.08
Semi-Annual Premium Amount	\$68.82
Total Premium Due	\$22.94
Delivery expiration date	Jan 09, 2018
Is Payment by Credit Card Allowed	Yes

**Activity History**

Date	Activity
Jan 17, 2018 06:00:10	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860
Jan 16, 2018 04:00:06	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860
Jan 15, 2018 02:00:05	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860
Jan 14, 2018 00:00:07	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860
Jan 12, 2018 22:00:13	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860
Jan 11, 2018 20:00:12	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860
Jan 10, 2018 18:00:14	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860
Jan 09, 2018 16:00:15	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860
Jan 08, 2018 16:00:02	Policy offer reminder notification sent to Consumer UMZZEGEYZPO JNIGVOG at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00258860

Click on **Back to Dashboard** to return to previous view

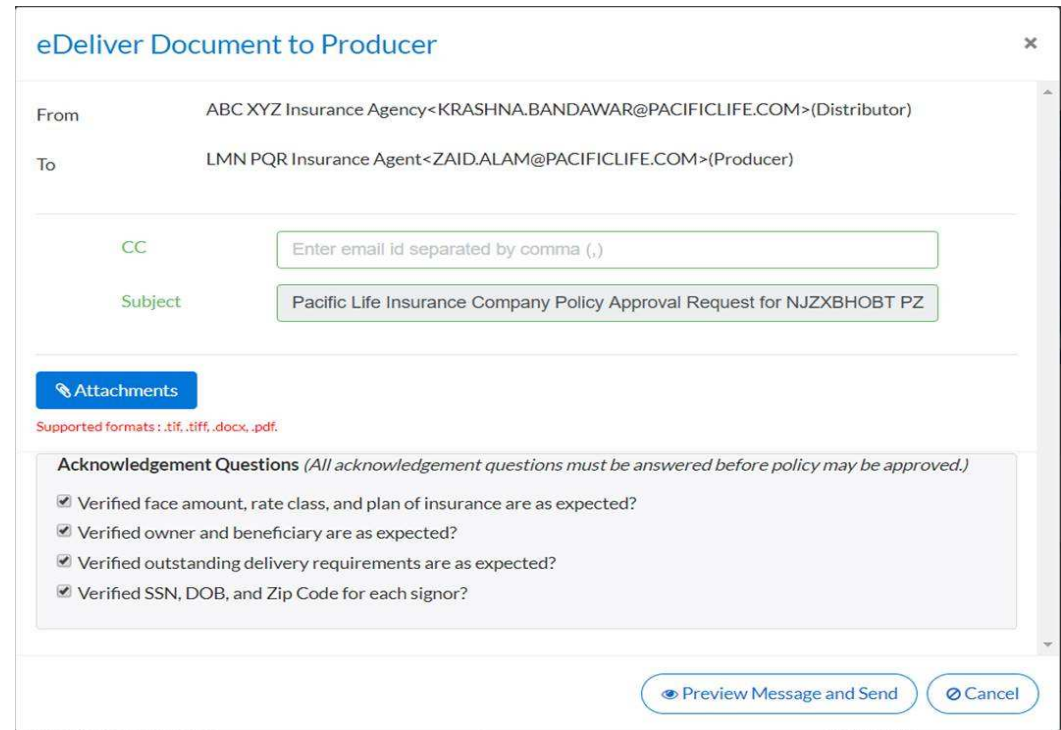


# Distributor View

- View Details allows the user to do one of the following.



Distributor/Producer must check each of the **Acknowledgement Questions** before the **Preview Message and Send** button will function.



# Distributor View

- To the right is a sample of the Preview Email pop-up:

From: BGA NAME<eDeliveryAdminTST@PacifcLife.com>  
To: PRODUCER NAME<ZAID.ALAM@TEST.COM>  
CC:  
Subject: Pacific Life Insurance Company Policy Approval Request for WPSLUXPUZ KSAKJWUICRO

Re: Life Insurance Policy from Pacific Life

**POLICY, PRODUCER NAME**

**Policy Number: 2L00220780**

The referenced policy has been issued electronically and is ready for your review.

You can approve the policy by clicking on the link below.

This is a time sensitive process and requires your immediate attention.

You will need to enter your PL eDelivery username and password.

If this is your first time using PL eDelivery, forgotten your username and password or if you are experiencing technical difficulties, please email [LYNAppSupIncidents@PacifcLife.com](mailto:LYNAppSupIncidents@PacifcLife.com)

[Click here to Approve Policy](#)

For more information about Pacific Life please visit [www.PacifcLife.com](http://www.PacifcLife.com)

# View History

Case history is a view of any policies issued for the proposed insured with policy details

**Case History** x

Policy#	Expiration Date	Insured	Status					
2L00182390	Nov 02, 2017	DNSKV PARDESIYQVND <small>Zaid.Alam@PacifiLife.com</small>	Not Started	Not Started	Not Started	Not Started	Not Started	<a href="#">View Details</a>
			●	●	●	●	●	
			Distributor	Producer	Owner	Insured	Payor	
2L00182390	Nov 01, 2017	DNSKV PARDESIYQVND <small>Zaid.Alam@PacifiLife.com</small>	Reissue Requested <small>Oct 12, 2017</small>	Not Started	Not Started	Not Started	Not Started	<a href="#">View Details</a>
			●	●	●	●	●	
			Distributor	Producer	Owner	Insured	Payor	

[OK](#)

# Producer View



E-deliver to Consumer	Reissue Request (click Submit when done)	Decline Offer (click Submit when done)	Re-send (window shows email will be re-sent to)	Request Delivery Extension:
<p>This action will launch the DocuSign copy of the policy. The producer may view and/or print a copy of the watermarked policy.</p>	<p>Select reason for re-issue</p> <ul style="list-style-type: none"> <li>•Reissue as Paper</li> <li>•Reconsideration of offer</li> <li>•Policy Effective date</li> <li>•Riders/Benefits</li> <li>•Owner</li> <li>•Beneficiary</li> <li>•Face Amount</li> <li>•Plan of Insurance/Product</li> <li>•Other</li> </ul> <p>Description for the re-issue (Free form box)</p>	<p>Select reason for decline:</p> <ul style="list-style-type: none"> <li>•Decline eDelivery</li> <li>•Coverage not as expected</li> <li>•Too expensive</li> <li>•No Longer Interested</li> <li>•Service related issue</li> <li>•Other</li> </ul> <p>Description for the decline (Free form box)</p>	<p>Resend available once policy is released to the consumer.</p> <ul style="list-style-type: none"> <li>• Resend email without reissuing the policy</li> </ul>	<p>The following pop-up will display the following type:</p> <ul style="list-style-type: none"> <li>•Request Delivery Extension can only be requested once. Once request is submitted to Pacific Life, you may not be able to perform any action until decision is made. Are you sure you want to continue? (Click <b>Submit</b> to confirm.)</li> </ul>

# Producer View- Policy Information

## Policy Information

[E-deliver to Consumer](#)
[Reissue Request](#)
[Decline Offer](#)
[Re-send](#)
[Request Delivery Extension](#)

[Back to Dashboard](#)

### Status - PENDING

**Policy No#**  
 2L00278400

**Expiration Date**  
 Feb 20, 2018

**Insured**  
 ZIJGZXQVFQGU NWQTZOGSILSH  
 KRASHNA.BANDAWAR@PACIFICLIFE.COM



### Policy Summary

*\*If unable to open PDF. Please disable popup blocker\** [Policy Package .pdf](#)

Policy number	2L00278400
Policy Plan Name	PL Promise Term 10
Issue Age	53
Face Amount	\$500,000.00
Rate Class	Preferred Best No Nicotine use
Payment Frequency	Monthly
Annual Premium Amount	\$683.88
Monthly Premium Amount	\$58.13
Quarterly Premium Amount	\$177.81
Semi-Annual Premium Amount	\$348.78
Total Premium Due	\$116.26
Delivery expiration date	Feb 20, 2018
Is Payment by Credit Card Allowed	Yes

### Activity History

Date	Activity
Jan 16, 2018 11:07:51	Login by PI: Consumer ZIJGZXQVFQGU NWQTZOGSILSH has successfully logged-in
Jan 16, 2018 11:04:55	Offer Accepted by Owner and Edelivered to Consumer (Insured) <a href="#">View Email</a>
Jan 16, 2018 11:04:18	Login by PO: Consumer FTGLPGDOARMD PUTOAXTFWPEU has successfully logged-in
Jan 16, 2018 10:58:20	Login by PO: Consumer FTGLPGDOARMD PUTOAXTFWPEU has successfully logged-in
Jan 16, 2018 10:53:12	PO printed or downloaded the policy package
Jan 16, 2018 10:49:03	Login by PO: Consumer FTGLPGDOARMD PUTOAXTFWPEU has successfully logged-in
Jan 16, 2018 10:31:39	E-Delivered to Consumer (Owner) <a href="#">View Email</a>
Jan 16, 2018 10:30:57	E-Delivered to Producer <a href="#">View Email</a>
Jan 16, 2018 09:47:52	Policy offer Created. Carrier Pacific Life sent policy to Distributor Case Manager ZANDER INSURANCE GROUP at KRASHNA.BANDAWAR@PACIFICLIFE.COM for document 2L00278400

# Consumer Email Notification



## PACIFIC LIFE

Re: Your Life Insurance Policy from Pacific Life

**PSJJHBCJYQ HWHGQEQ**

**Policy Number: 2L00272630**

Your life insurance policy is ready for your review and approval. Follow the instructions below to receive your policy package. You must complete the process electronically before your policy is effective. To access your policy package, you will need to follow the link below. This is a time sensitive process and requires your immediate attention.

[Access Policy](#)

For more information you may contact your producer.

If you have questions or need assistance with completing your policy electronically, please email [LYNLifeNB@PacificLife.com](mailto:LYNLifeNB@PacificLife.com) or call 844-276-5759.

For more information about Pacific Life please visit [www.PacificLife.com](http://www.PacificLife.com)

*Please note that, this mailbox is of the Pacific Life Electronic Delivery tool and is unattended. Please do not reply to this email.*

*NOTE: This message contains information that may be privileged or confidential and Do not forward this email to anyone. The Message Content and related documents or Weblinks are intended only for the person to whom it is addressed. Copying or distribution of this email, or any attachment, is prohibited. If you are not the intended recipient, you are not authorized to print, retain, copy, disseminate, distribute, or use this message or any part thereof.*

# PL eDelivery Login Page- Consumer View

- Users have “5” attempts to correctly login
- Consumer login
  - Last four digits of SSN
  - Zip code
  - Date of birth
- Owner, Payor or Consumer – will receive an email with a link to PL eDelivery tool

eDelivery Consumer login

**Welcome !**  
Your insurance document is available for review, to ensure your information remains secure and confidential, please answer the questions below :

Last four digits of your Social Security Number

Zip code of your home address (5 Digit)

Your Date of Birth (MM-DD-YYYY)

[Login](#)


# Consumer View

## Policy Details Summary page

Policy Details Summary	
Proposed Insured	ZIJGZXQVFQGU NWQTZOGSILSH
Policy number	2L00278400
Policy Plan Name	PL Promise Term 10
Issue Age	53
Face Amount	\$500,000.00
Rate Class	Preferred Best No Nicotine use
Payment Frequency	Monthly
Delivery Expiration Date	Feb 20, 2018

Next Steps to review and accept your Promise Term Life Insurance policy

Step 1: Preview Your Policy

 Pacific Life Insurance Policy for PLIC product  
*\*If unable to open PDF, Please disable popup blocker\**

Step 2: Select and provide Payment option (If you are the Premium Payor)

Step 3: Review and electronically sign policy delivery requirements

Authorization for Payment

HIV Consent Form

[Continue](#)

[Decline Offer](#) [Finish Later](#)

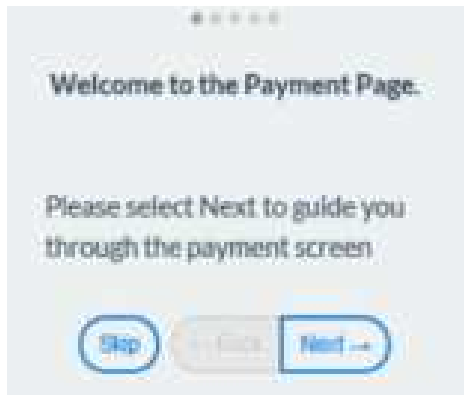
Step 1: Preview Your Policy

Step 2: Select and provide payment options

Step 3: Review and electronically sign policy delivery requirements



# Payment Plan Page



## Payment Plan

Please select your payment information.  
Keep in mind that your payment will not be processed until you approve and sign the document.

**\$58.13**  
Initial Payment Due

### Payment Frequency

*Selected payment Frequency will apply to initial payment (except if initial payment is already made in full) and future payments*

Annual <b>\$683.88</b> per year	Semi-Annual <b>\$348.78</b> twice year	Quarterly <b>\$177.81</b> per quarter	Monthly <b>\$58.13</b> per month
---------------------------------------	--	---	--

### Initial Payment

*Select the initial Payment method.*

Credit Card  Bank Account

Bank Account Holder Name	First Name	Last Name			
Additional Bank Account Holder Name	Optional				
Bank Account Holder Address	Bank Account Holder Address				
City	City	State	Please select	Zip	Zip
Financial Institution Name	Financial Institution Name				
Financial Institution Address	Optional				
City	City	State	Please select	Zip	Zip
Bank Routing Number (9 Digit)	Bank Routing Number (9 Digit) <a href="#">i</a>				
Checking Account Number	Checking Account Number <a href="#">i</a>				

### Future Payment

*Select the Future Payment method.*

Same As Above

*\*Credit Card is NOT available for recurring payment.  
\*Direct Bill is not allowed with Monthly Payment Frequency.*

Buttons: Back, Continue to eSignature, Finish later, Decline

# Payment Plan Page

Payment frequency selection updates the Initial Premium Due amount

Payment Plan	Initial Payment Due
<p><b>Payment Plan</b></p> <p>Please select your payment information. Keep in mind that your payment will not be processed until you approve and sign the document.</p>	<p><b>\$58.13</b></p> <p>Initial Payment Due</p>
<p><b>Payment Plan</b></p> <p>Please select your payment information. Keep in mind that your payment will not be processed until you approve and sign the document.</p>	<p><b>\$348.78</b></p> <p>Initial Payment Due</p>

Payment Frequency <small>Selected payment Frequency will apply to initial payment (except if initial payment is already made in full) and future payments</small>			
Annual	Semi-Annual	Quarterly	Monthly
<p><b>\$683.88</b></p> <p>per year</p>	<p><b>\$348.78</b></p> <p>twice year</p>	<p><b>\$177.81</b></p> <p>per quarter</p>	<p><b>\$58.13</b></p> <p>per month</p>

Payment Frequency <small>Selected payment Frequency will apply to initial payment (except if initial payment is already made in full) and future payments</small>			
Annual	Semi-Annual	Quarterly	Monthly
<p><b>\$683.88</b></p> <p>per year</p>	<p><b>\$348.78</b></p> <p>twice year</p>	<p><b>\$177.81</b></p> <p>per quarter</p>	<p><b>\$58.13</b></p> <p>per month</p>

# Good Health Statement

## SUPPLEMENT REGARDING GOOD HEALTH AND CONTINUED INSURABILITY

As of today's date, are any answers and statements given in response to the requests for information in Application - Parts I and II and any supplements different from those given when you completed these forms ?

Since the date on which you signed the application-Part II or any supplement, have you been consulted or been examined or treated by Physician or other medical practitioner?

As of today's date, have you made any appointment for a visit to health-care treatment facility or health care provider?

# Policy Signing Completed

A confirmation screen is shown indicating the process is completed and premium amount to be charged. An email notification is sent advising review of the documents and how to retrieve the policy once in force.

## eSign Completed

Thank you for providing the payment details. Your electronic signature is applied on the documents and currently with Pacific Life for review. Based on the policy Owner's signature date on Policy Delivery Acknowledge form, your total Initial Payment Due is \$58.13

If you have questions or need assistance with completing your policy electronically, please email [LYNLifeNB@PacifiLife.com](mailto:LYNLifeNB@PacifiLife.com) or call 844-276-5759.

For information about Pacific Life please visit [www.PacifiLife.com](http://www.PacifiLife.com)

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Re: Life Insurance Policy from Pacific Life

SXFRKTIHLCD XXTLPLI

Policy Number: 2L00275900

Congratulations for accepting a Life Insurance policy from Pacific Life. Documents are currently with Pacific Life for review. Upon completion, you'll receive an email from [edeliveryAdmin@pacifiLife.com](mailto:edeliveryAdmin@pacifiLife.com) to register on "MY LIFE ACCOUNT". Once Registered, you will have access to the completed Policy Package for your records.

If you have any questions regarding your policy, please contact your life insurance producer.

If you have questions or need assistance with completing your policy electronically, please email [LYNLifeNB@PacifiLife.com](mailto:LYNLifeNB@PacifiLife.com) or call 844-276-5759.

For more information about Pacific Life please visit [www.PacifiLife.com](http://www.PacifiLife.com)

Please note that, this mailbox is of the Pacific Life Electronic Delivery tool and is unattended. Please do not reply to this email.

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# My Life Account

When the case is in good order, all requirements are received and the case goes inforce, **users** will receive an email with a link to register on My Life Account to view and print their policy package.



Re:Life Insurance Policy from Pacific Life

MDWJYIUSN APFHZSKUKUC

Policy Number: 2L00237230

Congratulations for accepting a Life Insurance policy from Pacific Life. Please register your account on My Life Insurance Account. Once registered, you have access to retrieve your policy, review policy details, and select options to request changes.

[Click to Register your My Life Insurance Account](#)

If you have questions or need assistance with completing your policy electronically, please email [LYNLifeNB@PacificLife.com](mailto:LYNLifeNB@PacificLife.com) or call 844-276-5759.

For more information about Pacific Life please visit [www.PacificLife.com](http://www.PacificLife.com).

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PACIFIC LIFE Home Log In Register

### My Life Insurance Account

**Policyowner Log in**

User ID

Password

Remember my ID [Read me](#)

[Log in](#) [Forgot User ID or Password?](#)

**First Time User**

This secured website is for Life Insurance Policyowners only. If you have never accessed the site, please complete our short registration process.

[Register](#)

**Questions?**

Call Customer Service  
(800) 347-7787  
Monday - Friday  
5:00 AM - 5:00 PM Pacific Time  
(excluding holidays)

**SERVICE FORMS**  
Access our most commonly requested forms.

For New York issued policies, [please select from these forms.](#)

For PL Promise Product policies, [please select from these forms.](#)

**INITIATE A CLAIM**  
Click here to start the claim process.

**DAILY UNIT VALUES**  
Available for Pacific Life's variable universal life insurance products.

You should carefully consider a variable life insurance product's risks, charges, limitations, and expenses, as well as the risks, charges, expenses and investment goals/objectives of the underlying investment options. This and other information about Pacific Life insurance products are provided in the applicable product and underlying fund prospectuses which are available from your life insurance producer or by clicking here. Read them carefully before investing or sending money.

Pacific Life refers to Pacific Life Insurance Company and its affiliates, including Pacific Life & Annuity Company. Insurance products are issued by Pacific Life Insurance Company in all states except New York and in New York by Pacific Life & Annuity Company. Product availability and features may vary by state. Each insurance company is solely responsible for the financial obligations arising under the products it issues. Insurance products and their guarantees, including optional benefits and any crediting rates, are backed by the financial strength and claims-paying ability of the issuing insurance company, but they do not protect the value of the variable investment options. Look to the strength of the life insurance company with regard to such guarantees as these guarantees are not backed by the broker-dealer, insurance agency or their affiliates from which products are purchased. Notice: These entities are their representatives make any representation or assurance regarding the claims-paying ability of the life insurance company. Variable insurance products are distributed by Pacific Select Distributors, LLC (Member FINRA & SIPC), a subsidiary of Pacific Life Insurance Company, and an affiliate of Pacific Life & Annuity Company, and are available through licensed third-party broker-dealers.

Pacific Life's Home Office is located in Newport Beach, CA.

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## ▶..... CONTACT

Please do not hesitate to reach out to the team with additional questions and support.



### PL eDelivery Support Contact Information

- Customer Service Support Help:  
844-276-5759
- Office Hours: Mon.-Fri., 9:00am-  
8:00pm EST
- Email: [LYNLifeNB@PacificLife.com](mailto:LYNLifeNB@PacificLife.com)

