

# Flex for Asset Care<sup>®</sup> Transition Tips

**Flex for Asset Care is now available in more than 35 states.**

Flex transforms the underwriting process for our Asset Care product to deliver faster, better service to your clients. Here are key tips for an enhanced experience.

## **1. Don't duplicate a pre-Flex case.**

Start fresh. Applications started in the old version of Sales Connection cannot be submitted successfully.

## **2. Prepare with practice.**

Give the new eApp and Flex system a whirl before you introduce them to clients. Both the Flex system and eApp are live in the Sales Connection Practice Center.

## **3. Sharpen your Flex skills.**

Need resources and tools? Visit the [Flex Resource page](#), where you'll find answers to your questions, helpful training resources and more.

## **4. Discontinue ordering requirements for Asset Care cases.**

OneAmerica Financial now orders all requirements for all Asset Care cases. This is true for all states – not just those that offer Flex.

## Paper App Transition Tips

### **Know the flow: What happens to paper applications**

Flex brings some changes to paper applications as well. Here are some important reminders for paper applications going into the launch of Flex.

1. Use the new Asset Care Part 1 application (form I-36865) in states where Flex has launched. See the [state grid](#) for additional details.
2. The Illumifin interview will be the only Part 2 option available for paper apps in any state.
3. OneAmerica Financial will handle ordering all requirements for Asset Care cases going forward.

## Abandoned eApps

### Know the flow: What happens to inactive applications

Our Flex process still includes a HIPAA release form. When signed by a client, a HIPAA form gives us access to a client's protected health information. To keep clients' personal information safe, there are new parameters and guidelines for inactive applications in the system.

Here's what you can expect:

**If the HIPAA form has not been signed:** The process for inactive applications will remain the same. They will be purged from the system after 120 days and removed from your My Cases file.

**If the HIPAA form has been signed and an application is inactive:**

- **In 75 days:** You'll receive an email notification to let you know the application will be considered abandoned and that it will be locked if it has not been submitted after 90 days.
- **In 90 days:** Inactive applications will be marked abandoned and locked in the system. You'll still be able to view these applications, but you won't be able to duplicate, reactivate or complete them. You will be able to delete abandoned applications and start new ones.
- **In 120 days:** Inactive applications that are marked abandoned will be purged from the system and removed from your My Cases file.

**Keep your applications active.** If you're waiting on clients, keep your applications active by checking them frequently and completing them in full as soon as possible.

OneAmerica Financial is the marketing name for the companies of OneAmerica Financial. • Products issued and underwritten by The State Life Insurance Company® (State Life), Indianapolis, IN, a OneAmerica Financial company that offers the Care Solutions product suite. Asset Care form numbers: ICC18 L302, ICC18 L302 JT, ICC18 L302 SP, ICC18 L302 SP JT, ICC18 R532, ICC18 R533, ICC18 R539, ICC18 SA39, ICC18 R540, ICC24 R545, ICC24 R546 and ICC24 R547. Not available in all states or may vary by state.

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