

SMU 2.0 Consumer Path Reviewing App and Completing Binder Payment - Training for Brokers Transcript

To begin the forwarding process flow, you can start with filling in the first and last name of the primary applicant information page.

The date of birth of the primary applicant is already entered.

Then click the next button.

On this page, you will see the from field as the name of the broker while the recipient email field is the email of the consumer or primary applicant who will be getting the application.

then click the send button. And this will complete the application forward process or you can click the button to go back to the dashboard.

The consumer will then receive an email where they can see the broker details.

The consumer clicks the complete application button.

After that, the consumer provides the last name and verifies the date of birth then clicks the next button. They will then be asked to either create an account or sign in.

After signing in, the consumer can see the application on their dashboard. They can also see the complete application button which can be clicked to view the application details.

The consumer can see the review your application page including the details of the broker. When the consumer scrolls down, they will see information about the primary applicant. The consumer can still edit the application at this point.

Once they are good with the information shown, they can click the confirm button.

The consumer will be routed to the application agreement screen.

This is where the consumer will sign electronically by entering their first and last name then click next. Because this example is a California application there is another application agreement document. This is only applicable to California and Hawaii.

The payment screen shows three options, save and exit, back and add payment method.

The consumer clicks the add payment method button.

As you can see on this new screen, there is no pop-up window that used to show in the previous system.

In this one, it will be just like another page in the application submission process.

The consumer can select credit or debit card, or the bank account and enter the needed account details such as the name on the account, zip code and bank account number.

Once the consumer clicks the save payment method button, they are routed to the confirmation page.

This page displays a prompt at the top.

Add or cancel funding has been successfully submitted and waiting for server to redirect or show errors.

On this page, the saved payment method displays so the consumer can review their plan and payment details again.

The consumer then selects the checkbox to authorize the payment and accept the terms and conditions.

Finally, the consumer clicks the set up payment button.

Once done, the consumer will see a confirmation page of the first months payment including the plan information and the last four digits of the card used for payment. as well as the broker information.

If everything is correct, the consumer clicks the next button.

This is the set up automatic payments screen.

On this page, the system will ask the consumer if they want to set up automatic payments. They can select yes to set up automatic monthly payments and choose the same payment method or they can add another payment method.

If the consumer does not want to set up automatic payments, they select no to submit their application. For this example, no automatic payments are wanted, so the consumer clicks the submit application button.

This screen shows that the application has been submitted. It also shows the detail of the application such as the application ID, plan details and broker information.

The is also on this page to upload the required documents needed for the application. This page shows the arbitration agreement.

From here, the consumer can click the dashboard button.

On this screen, you can see that the application is in pending attestation status. Which means it has gone to the broker so that they can attest the application.

This is the complete application process.

This is the view from the broker's login.

There is one pending attestation.

The broker would attest this application so that it can be submitted.