GETTING STARTED WITH MUTUAL OF OMAHA

Sales Professional Access

Mutual of Omaha

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Updated May 2024

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Introduction to Sales Professional Access

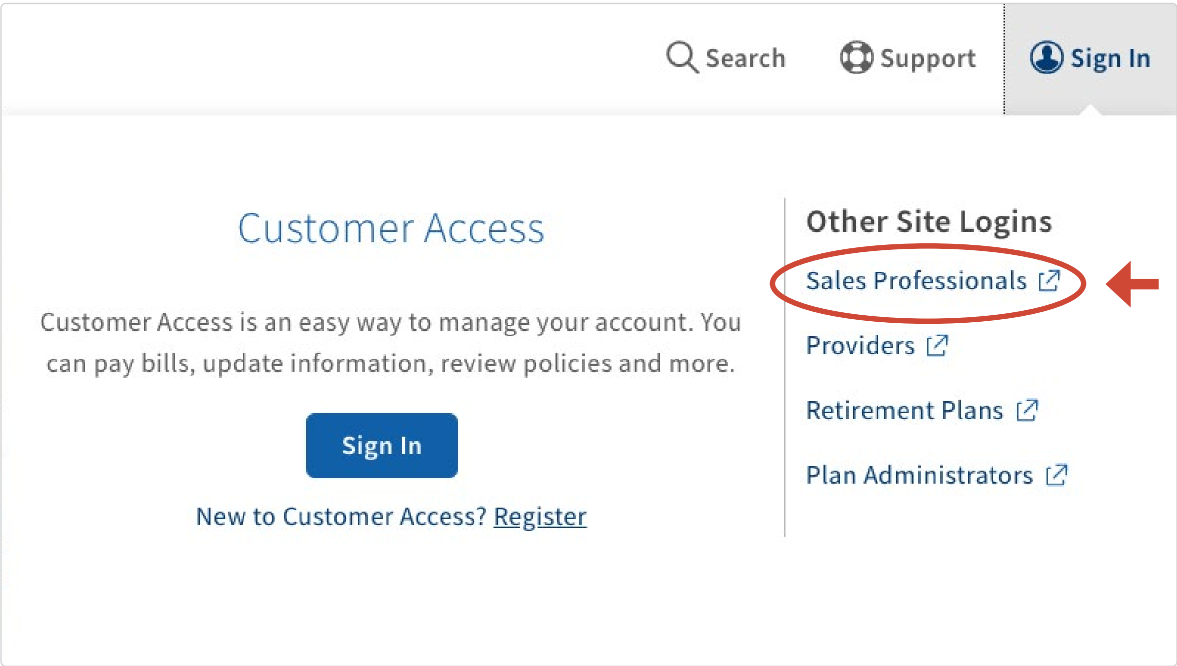
Sales Professional Access (SPA) is your one-stop shop to find all the resources you need at Mutual of Omaha.

After logging in you can find:

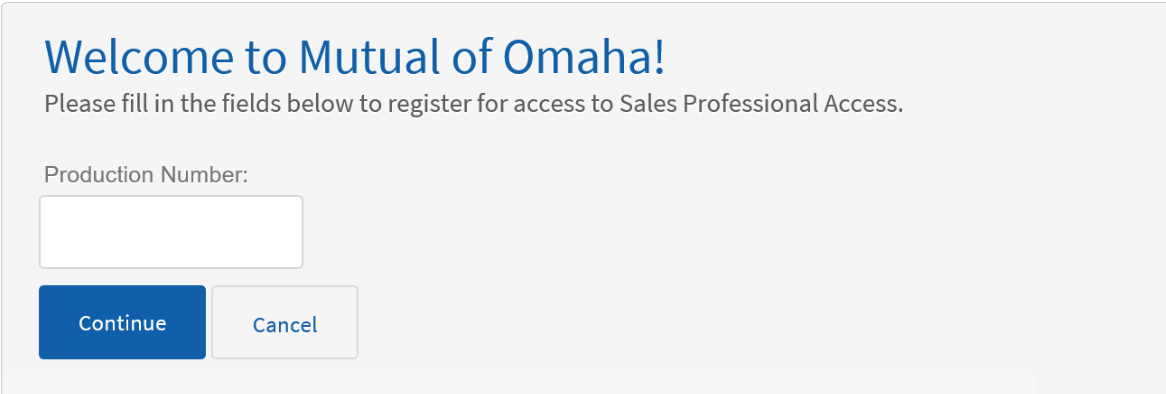
- Product information and sales ideas
- Downloadable PDFs of all forms and marketing materials
- Quoting software
- e-Applications
- Reports

How to Register on SPA

- Open your web browser (Chrome, Edge, Firefox, or Safari) and enter www.mutualofomaha.com in the address bar
- Click on "Sign in" and choose Sales Professionals

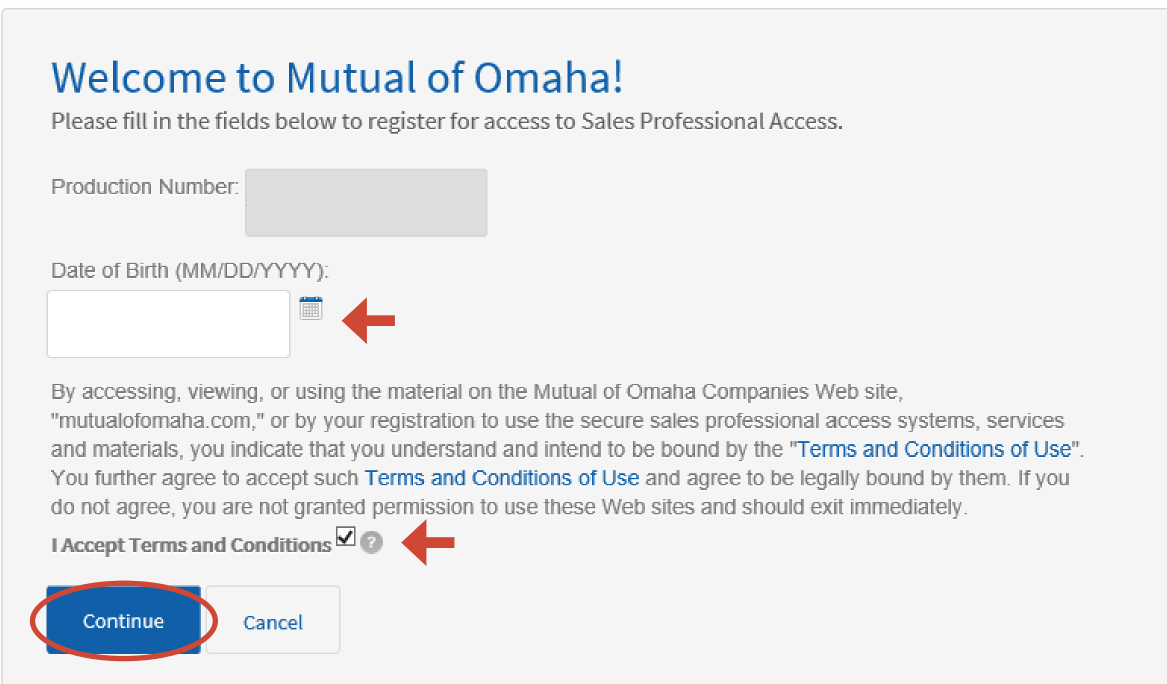


- Enter your production number in the text box and click “Continue”

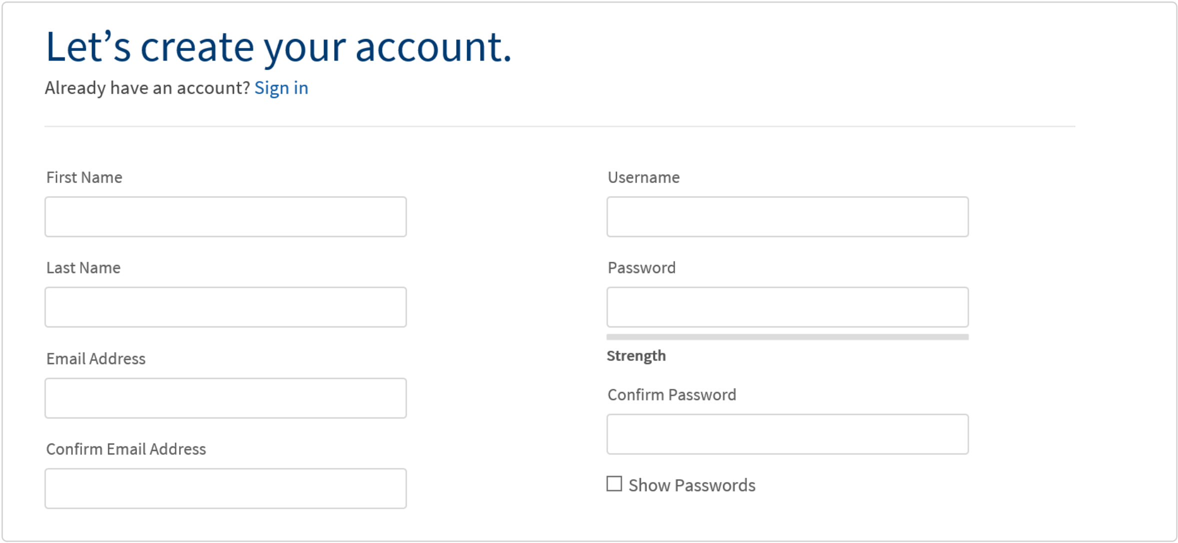


It is important that you complete all fields on the registration form.
Note: The “continue” button will not be enabled until all required fields have been completed.

- Enter your “Date of Birth” and check the “I Accept Terms and Conditions” box and click “Continue”



- Create your account



Let's create your account.

Already have an account? Sign in

First Name

Last Name

Email Address

Confirm Email Address

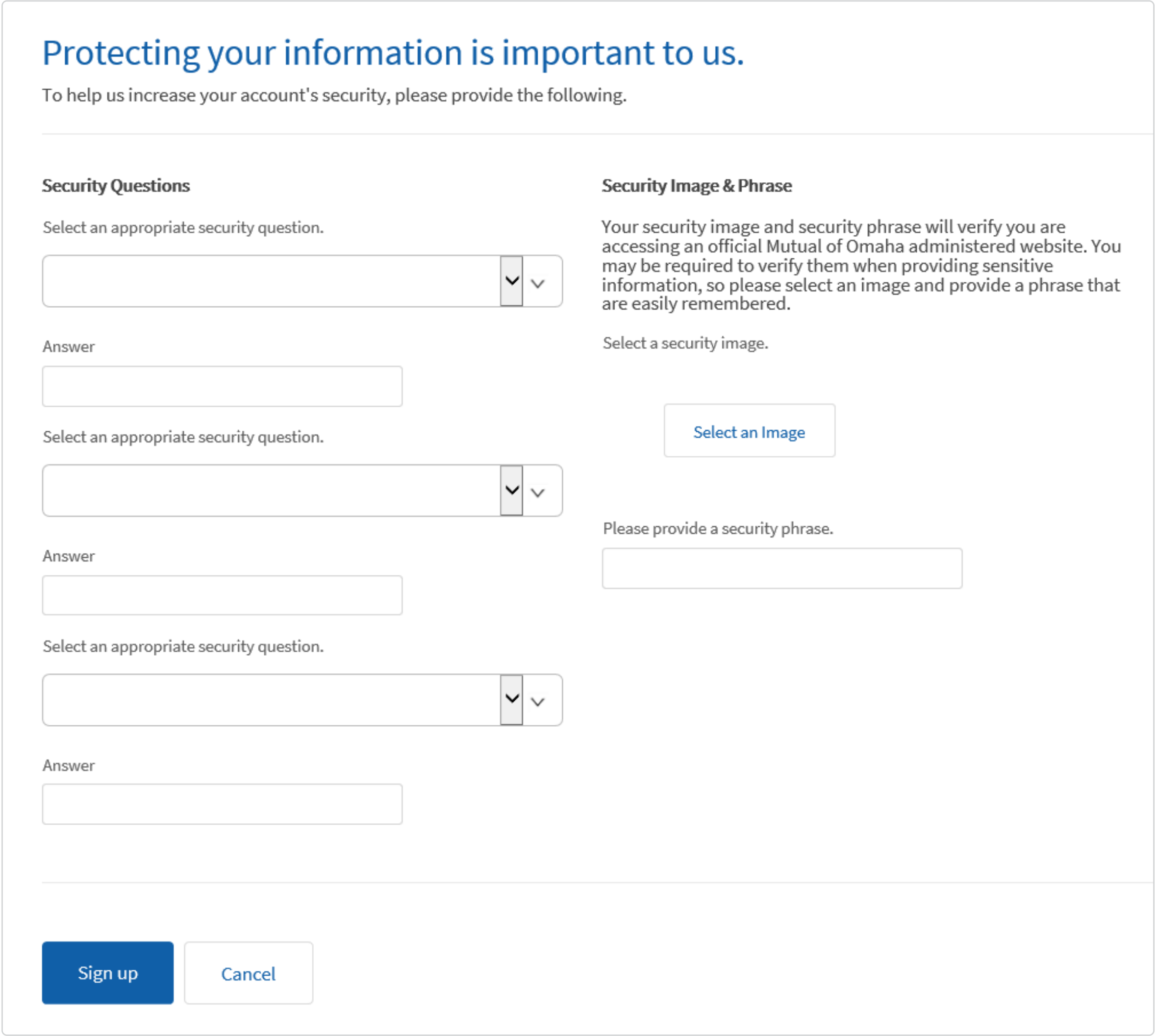
Username

Password

Strength

Confirm Password

☐ Show Passwords



Protecting your information is important to us.

To help us increase your account's security, please provide the following.

Security Questions

Select an appropriate security question.

Answer

Select an appropriate security question.

Answer

Select an appropriate security question.

Answer

Security Image & Phrase

Your security image and security phrase will verify you are accessing an official Mutual of Omaha administered website. You may be required to verify them when providing sensitive information, so please select an image and provide a phrase that are easily remembered.

Select a security image.

Select an Image

Please provide a security phrase.

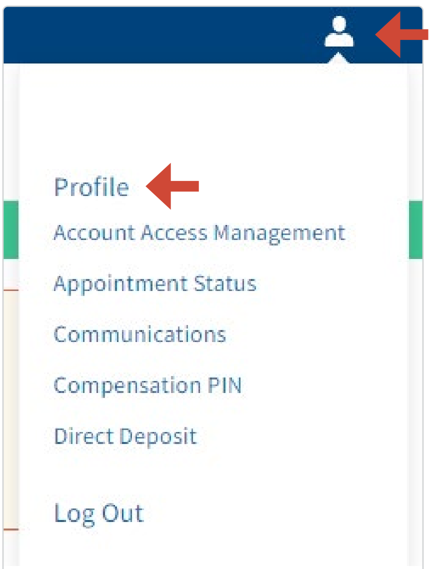
Sign up | Cancel

You are now registered for SPA.

You will be instructed to log in using the username or email address and password you have created.

How to Update Your Sales Professional Access (SPA) Email Address

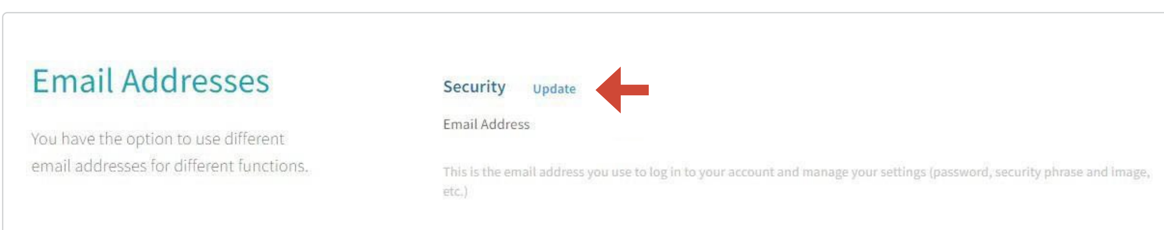
To authenticate using your email address, you must follow the following steps BEFORE you click the Email Authentication Setup button. The email address you have listed on Sales Professional Access is where the authentication email will be sent. There is not an option to enter an email address, for the authentication email to go to. Please follow the following steps prior to setting up Email Authentication.



Updating Your Sales Professional Access (SPA) Email Address:

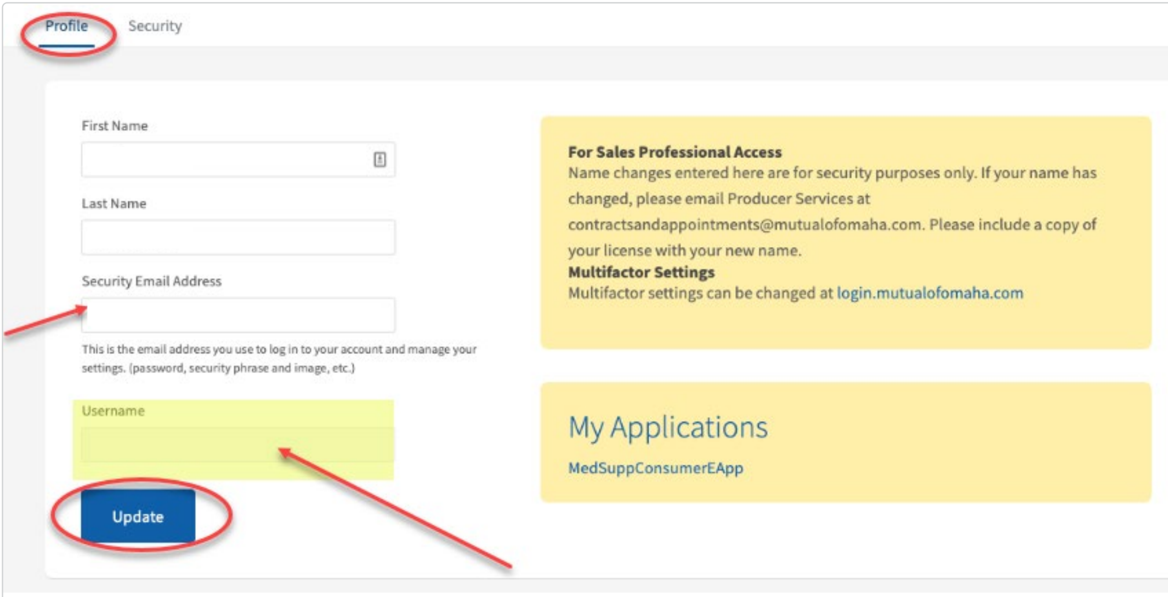
- Log on to Sales Professional Access (www.mutualofomaha.com/broker)
- In upper right-hand corner, select image of the person
- Select "Profile"
- Review your information and update as needed
- After the change(s) are made, click "Update"

If you need to update your email address that is associated with SPA, you will click the blue "Update" button (see below).

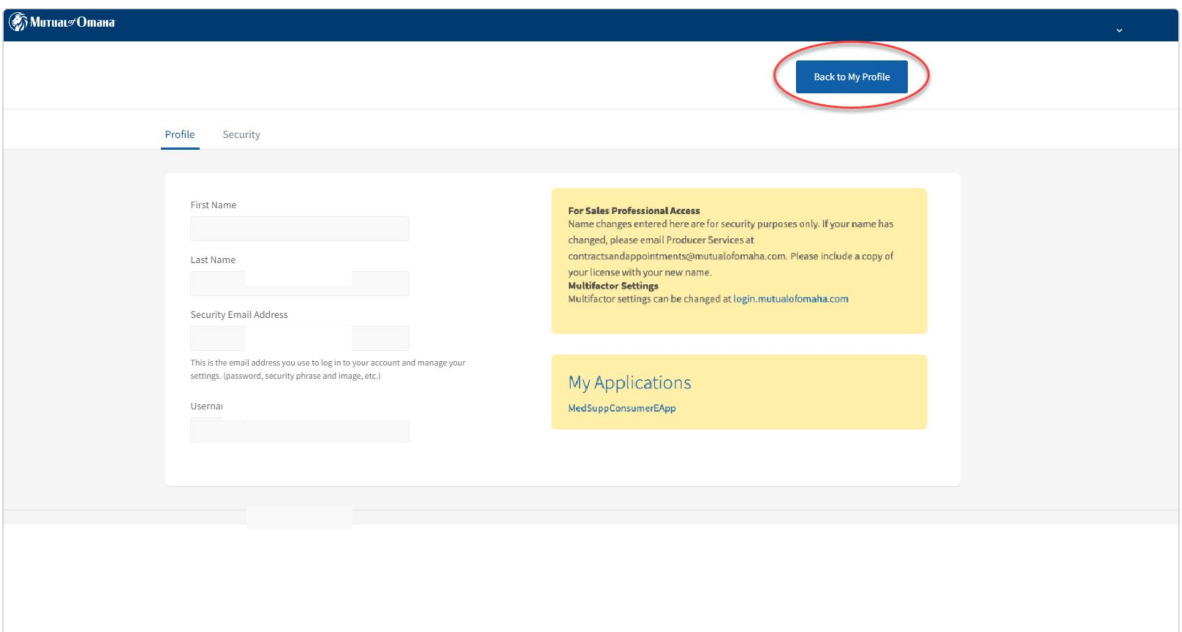


This is the email address that the email authentication will go to. Please review for accuracy! If you need to update your email information and have clicked the blue "Update" button, you will be redirected to the Profile edit screen (see image on following page).

Here you can edit your email address. When finished click the blue “Update” button.



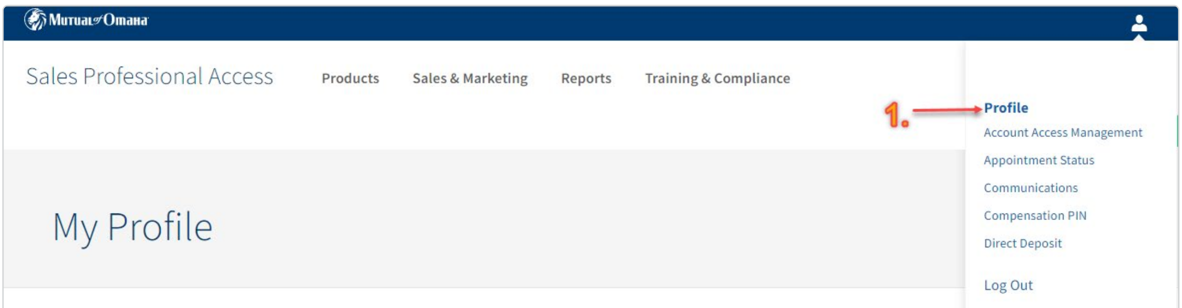
Once you have clicked the “Update” button, you will see a note that says, “Successfully updated profile.” This will appear right above the blue “Update” button. At this time, you can click the “Back to My Profile” button at the top of the screen (see below).



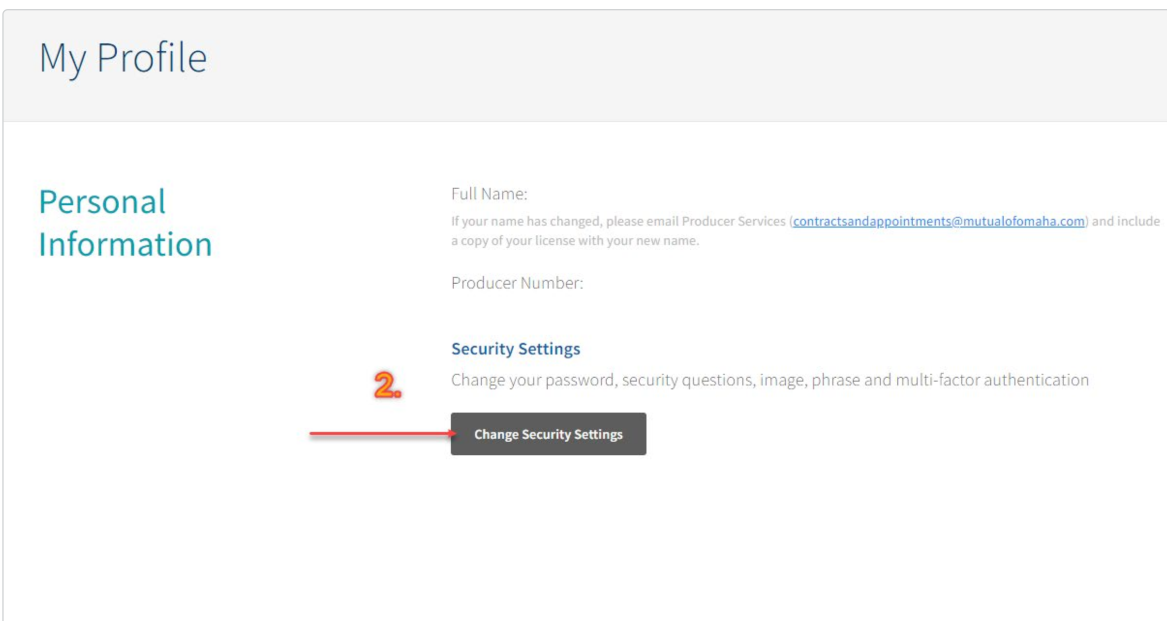
Identifying Your Username on SPA or Updating Your Password

If you are unsure of what your Sales Professional Access username is, it can be identified using the following steps:

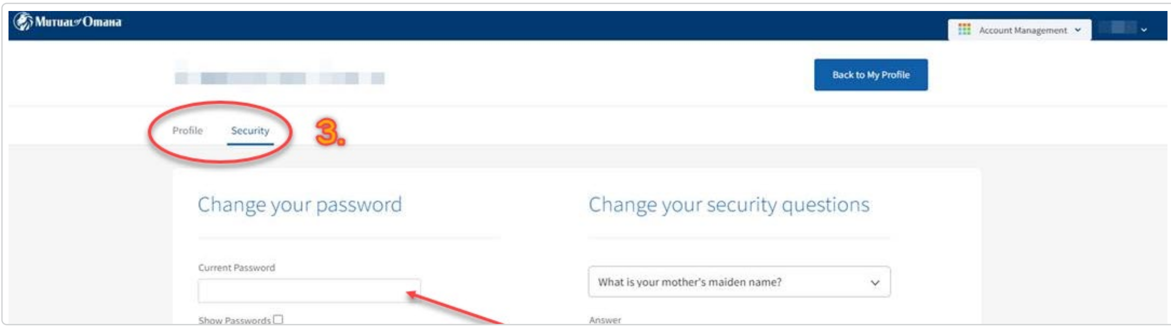
1. Click the person image in the top righthand corner of your screen, then select "Profile."

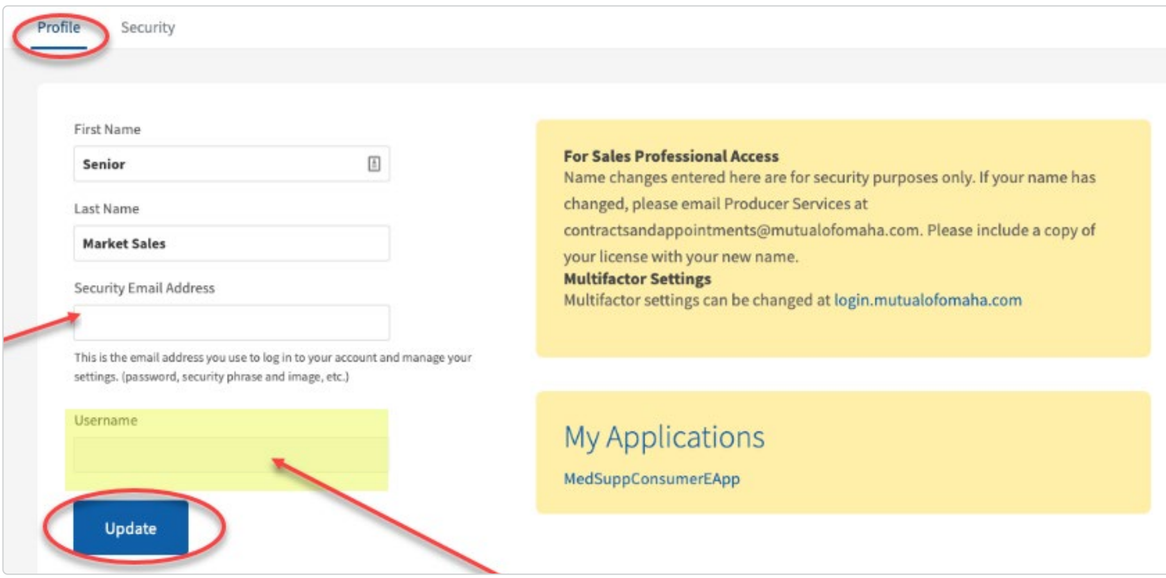


2 . Once in the "Profile": Personal Information tab, you will see your name, as well as a blue button that says "Change Security Settings." Click this blue button to go into the security portion of your profile.



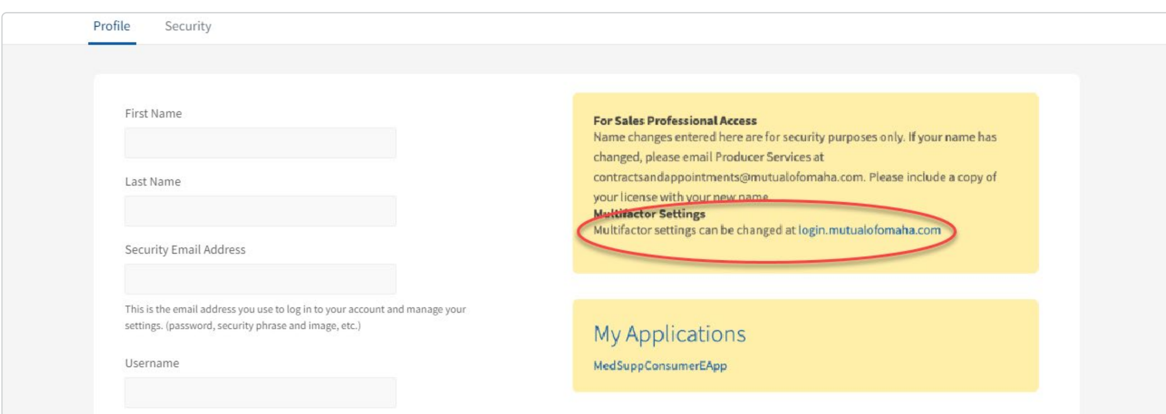
3. This screen will show your Profile and Security settings. On the Security screen, you can change your password, security questions, email address and identify your username.





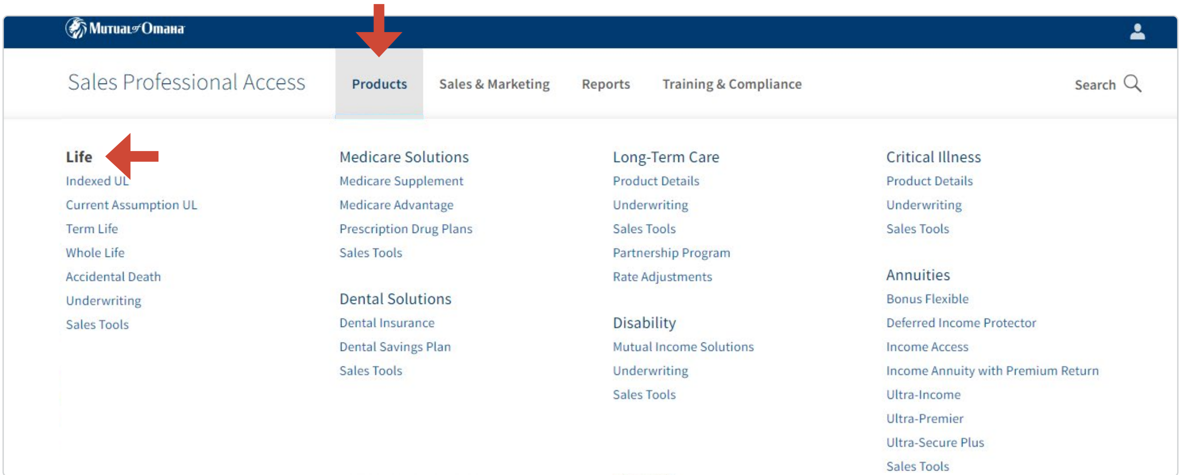
Your username, as well as the email address associated with your Sales Professional Access account, can be found here, under the “Profile” tab.

If you would like to manage your Okta Multifactor Authentication Methods, click the link on the “Profile” tab. Following this link will take you to your Okta Dashboard.

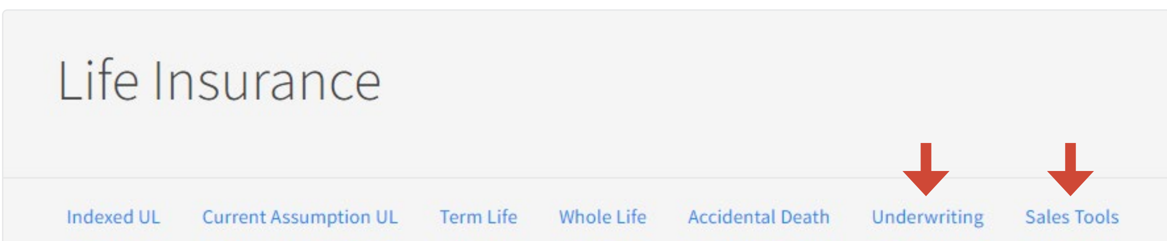


Product Information

From the SPA home page, hover over the **Products** tab in the navigation bar and select **"Life"** from the drop down menu.



Each tab has additional information on the life insurance products Mutual of Omaha offers.



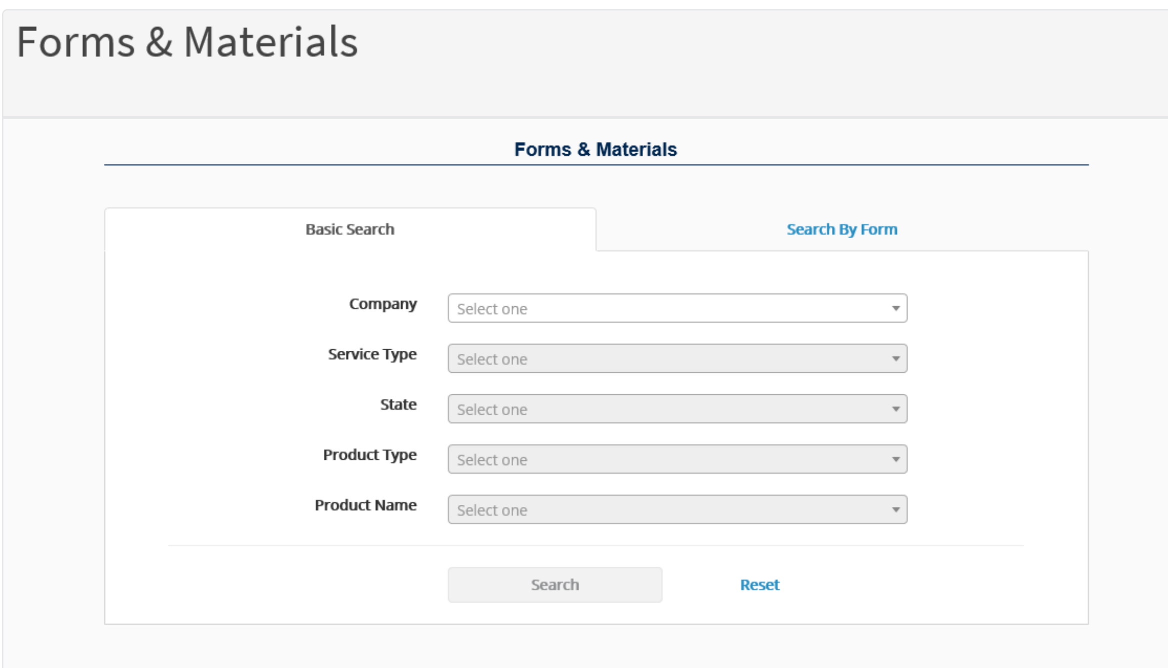
The **Underwriting** tab provides information on our underwriting guidelines, Fit Crediting program and Accelerated Underwriting program

The **Sales Tools** tab helps you learn even more about the products, provides sales ideas and competitive information.

Forms & Materials

From the SPA home page, hover over the **Sales & Marketing** tab in the navigation bar and select **"Forms & Materials"** from the drop down menu.

The Forms & Materials page will now be displayed.



For all basic searches you must select one of the following:

1 Company

- Mutual Medicare Advantage
- Mutual of Omaha – Med Supp/AD/CI/DI/LTC
- Omaha Health Insurance Company - PDP
- Omaha Insurance – Med Supp
- Omaha Supplemental Insurance Company (OSIC)
- United of Omaha – Life/Annuity
- United World – Med Supp

2 Service Type

- **New Business**
  Materials needed to submit business (app pack, outline of coverage)
- **Marketing**
  Materials used in sales process and prospecting (brochure, highlight sheet)
- **Prospecting**
  Materials that help find and build clientele
- **Policyholder Service**
  Materials needed post sale

3 State

(Note: quite a few forms are state specific)

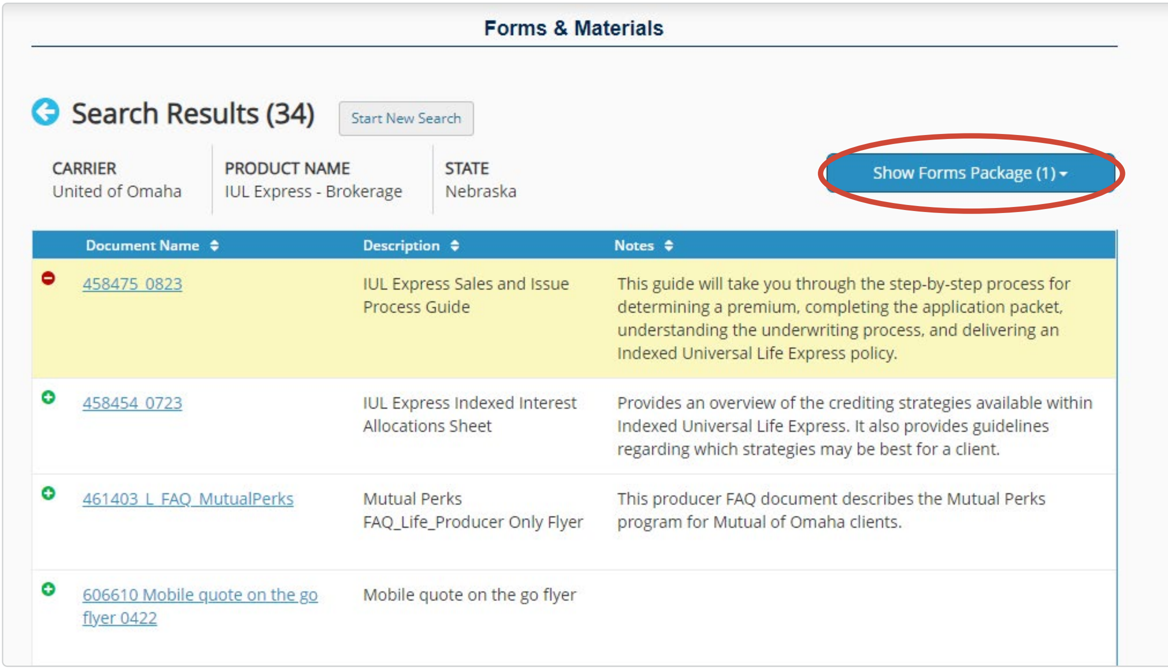
4 Product Type

- These will change based on the company you picked
  (Note: all products will show even if you are not appointed to sell them)

5 Product Name

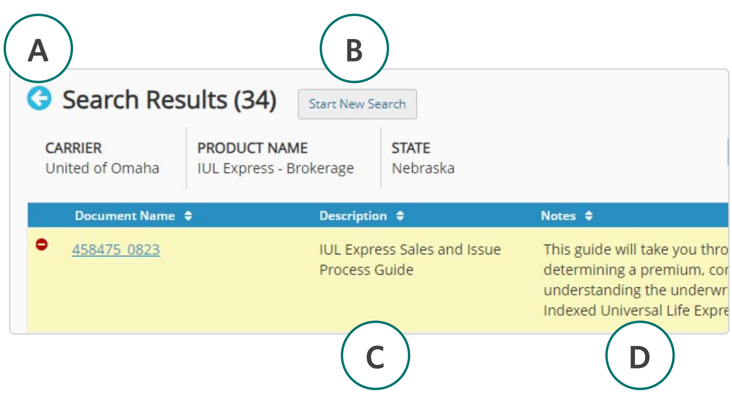
Search Results

A list of all approved materials, based on the filters you selected, will be displayed on the screen.



To view an item, click the form number listed under "Document Name." You can save the documents to your computer, email them or print them. Some forms can be filled out before saving or printing.

The forms highlighted in yellow are the forms selected in the **"Packages"** on the "Show Forms Package" drop down. This will group forms together to be saved, emailed or printed.



On the Search Results screen there are several helpful areas:

- **A** Click the arrow to modify your current search
- **B** Start a new search
- **C** A brief description of the material
- **D** The notes section provides how and what to use the form/material for

Illustrations & Quoting Tools

You have two options when quoting, Quotes for Sales Professionals (our mobile quoting app) and WinFlex for full illustrations.

Here's how to install the Mobile Quotes app:

1. Go to your app store
2. Search for "Mutual of Omaha Quotes for Sales Professionals"
3. Install and start quoting!

GET IT ON Google Play

Download on the App Store

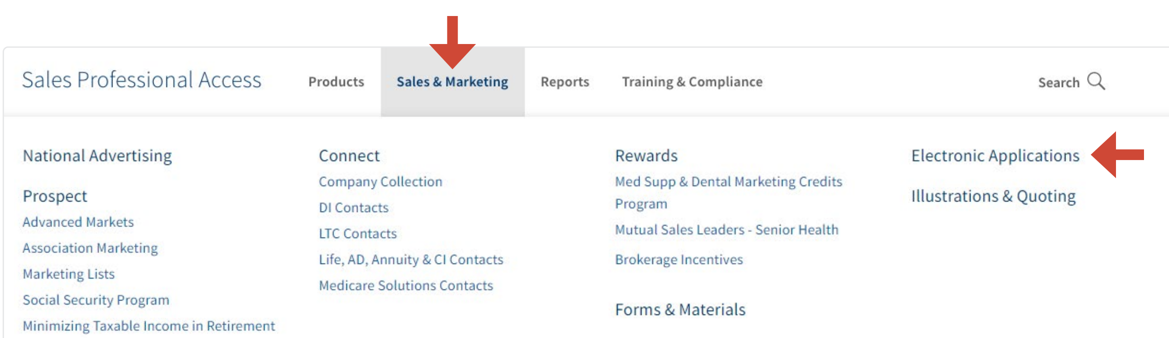
You can also scan the QR code below to run Mobile Quotes online:

Here's how to access WinFlex:

1. Visit winflexweb.com
2. Register for a free WinFlex web account
3. Go to your Profile and add Mutual of Omaha as a company
4. Your company access will be approved within one business day

e-Applications

From the SPA home page, hover over the **Sales & Marketing** tab in the navigation bar and select **"Electronic Applications"** from the drop down menu.



From there select the **Life e-Application section** from the menu on the left hand side. When you are ready to start an e-app, select **"Start e-App."** You will also find resources and user guides for the e-apps.

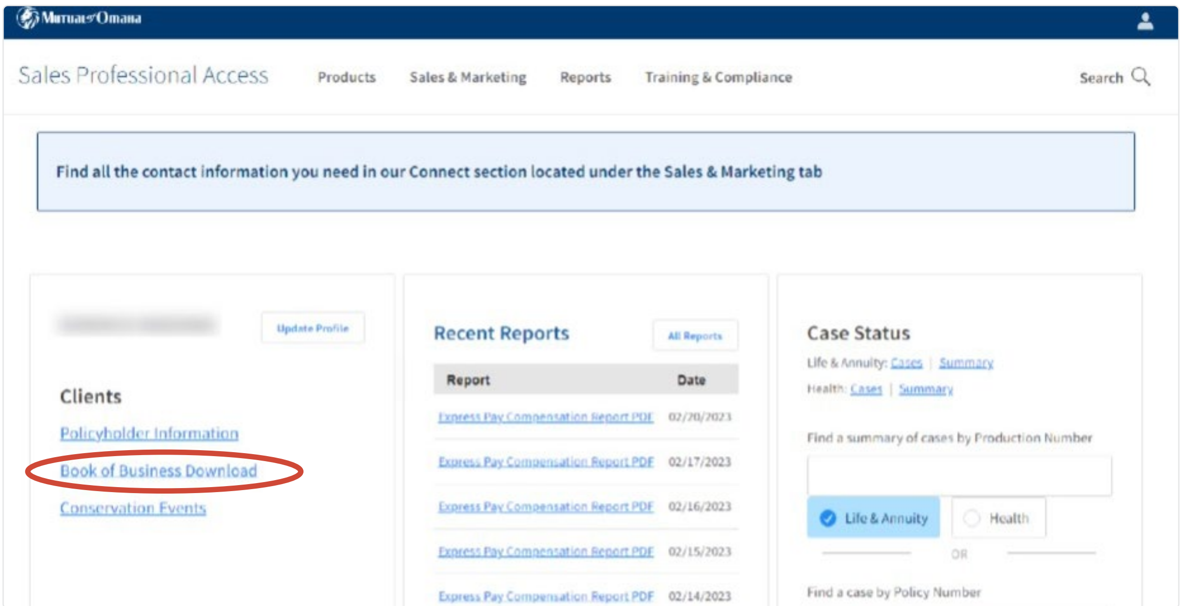
Reporting

Book of Business

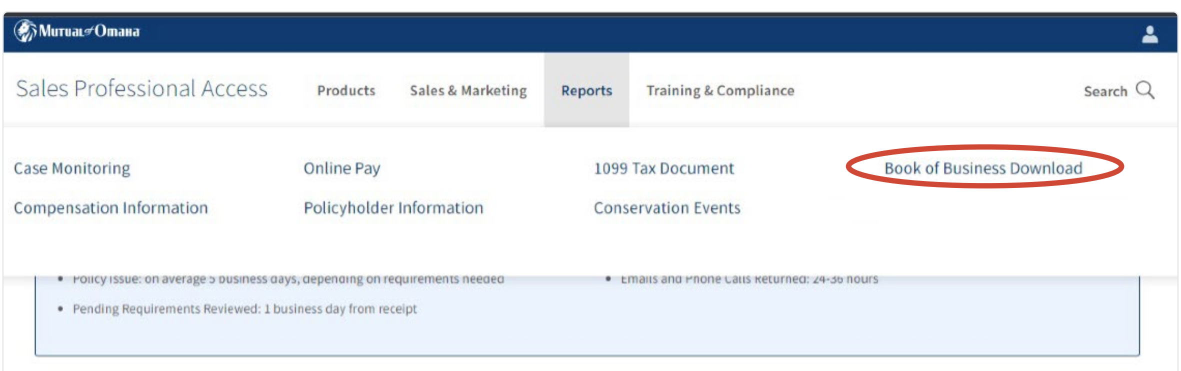
It's now possible to get a complete list of the in-force Mutual of Omaha policies you've sold in an instant with our Book of Business download. Follow the steps below to get your Book of Business download today.

Get Started

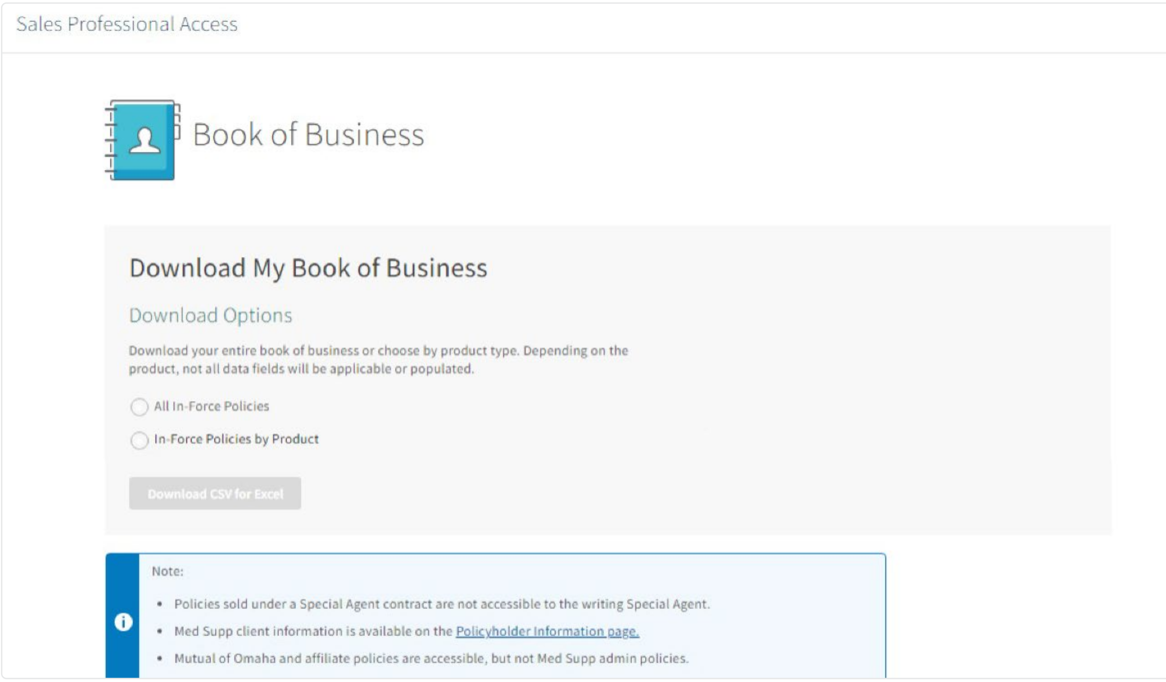
1. Go to Sales Professional Access: mutualofomaha.com/broker
2. After you log in, you'll find the Book of Business Download link in two places:
   - On the left side of the Sales Professional Access home page under the **Clients** heading



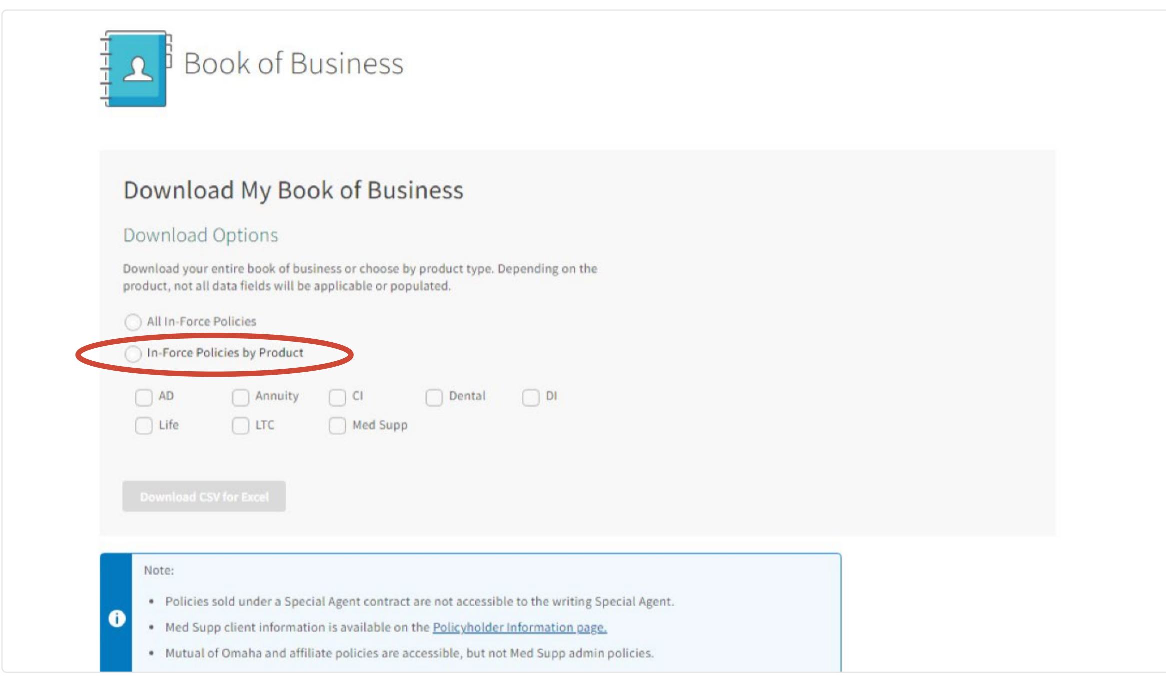
   - Hover over the **Reports** tab at the top of the screen, and click on the "Book of Business Download" link



1. Once you click on the Book of Business Download link, you'll see a Book of Business header on the screen



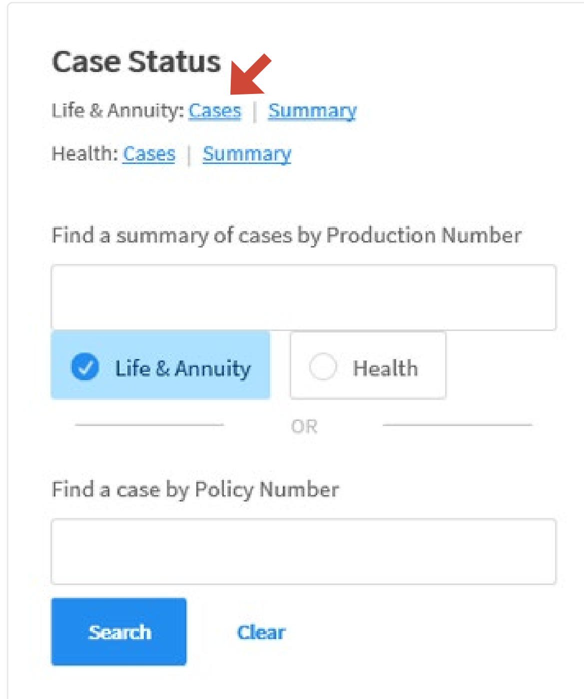
2. Select either All In-Force Policies or In-Force Policies by Product
3. If you select In-Force Policies by Product, you'll need to select the products you want included in your Book of Business download



4. Click the Download CSV for Excel button
5. Check the Downloads folder on your computer for the file

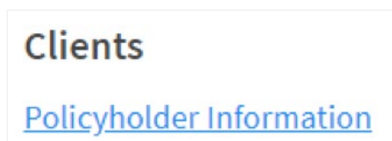
Case Status

On the right hand side select **"Cases"** under Case Status. This will show all cases submitted in the last 60 days and what their current status is. You also have the option within this report to export and/or print your cases.

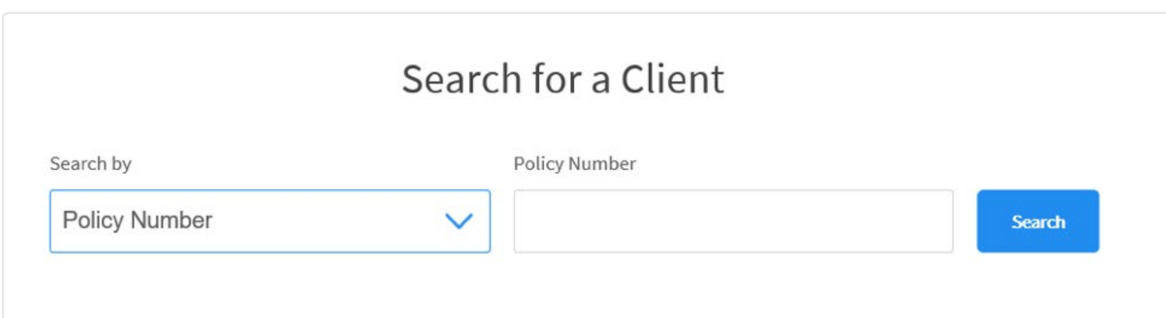


Policyholder Information

If you want to access cases submitted more than 60 days prior click on Policyholder Information under the **Clients** section.

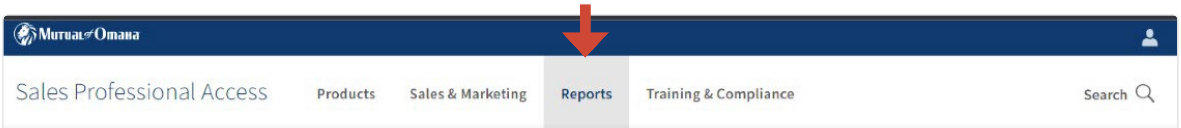


There are three ways to search for policy information: policy number, first initial and last name and last four digits of your Social Security Number. Select one of these options from the drop down. Once you select a policy, you will find full policy and customer information.

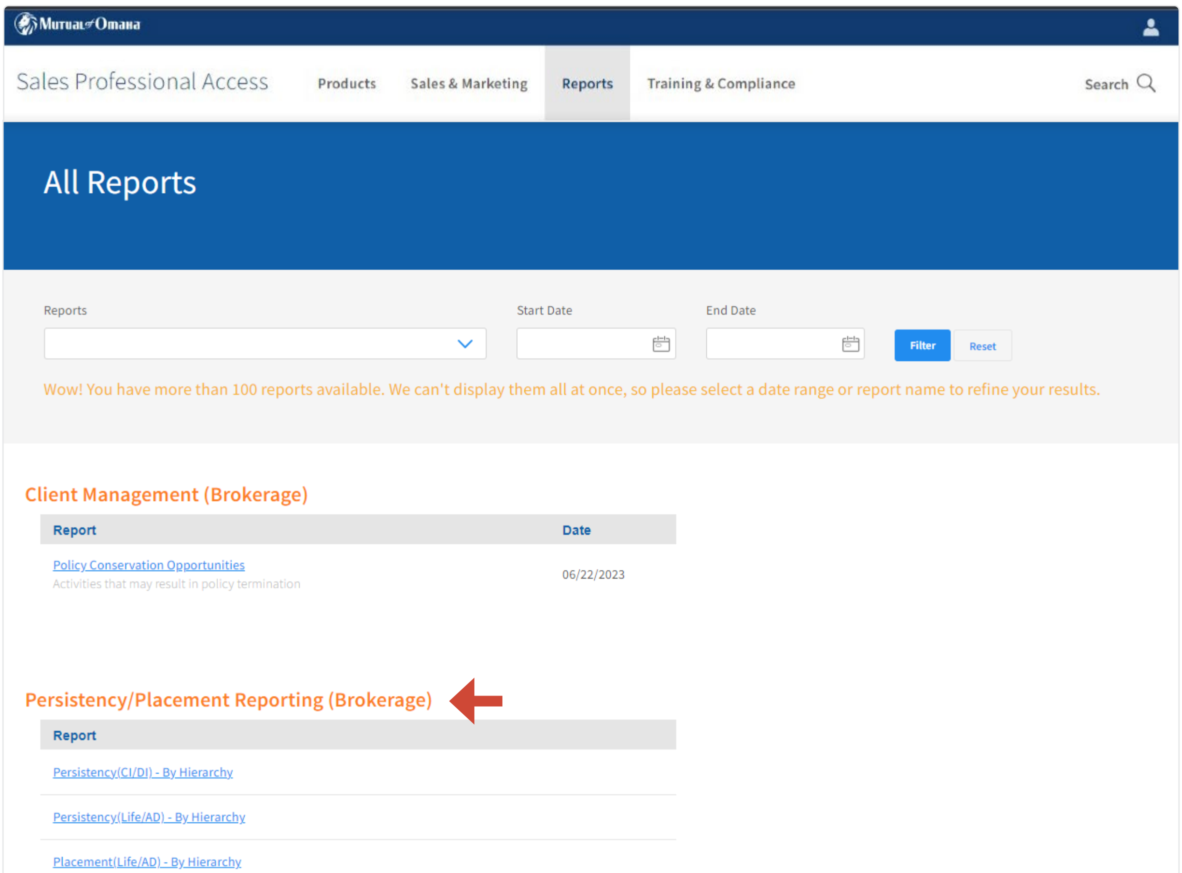


Persistency & Placement

To check your Persistency & Placement status, click on **Reports** at the top of the SPA Home Page.



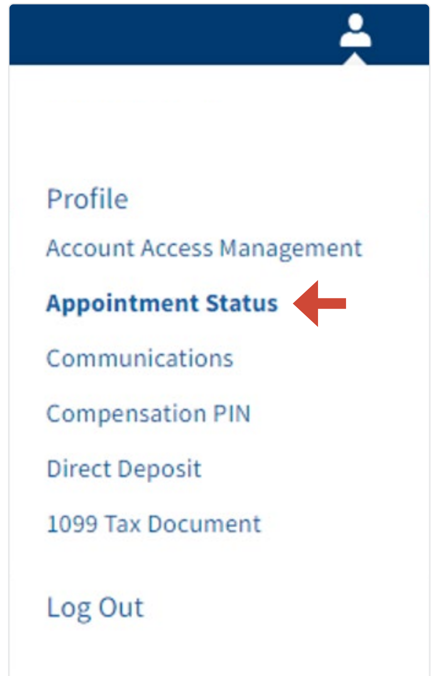
Once you click on Reports, the page will open and you'll be able to view your Client Management, Persistency & Placement and Compensation, along with several other reports that can be ran.



Contract & Appointment

From the SPA home page, click on your **Profile** icon and click "Appointment Status" under the profile drop down.

There you will find any upcoming or outstanding appointments.

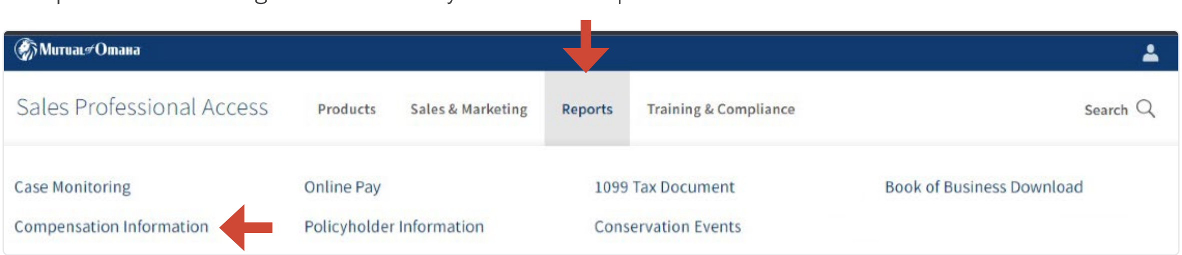


Conservation Events

From the SPA home page, hover over the **Reports** tab in the navigation bar and select "Conservation Events" from the drop down menu.

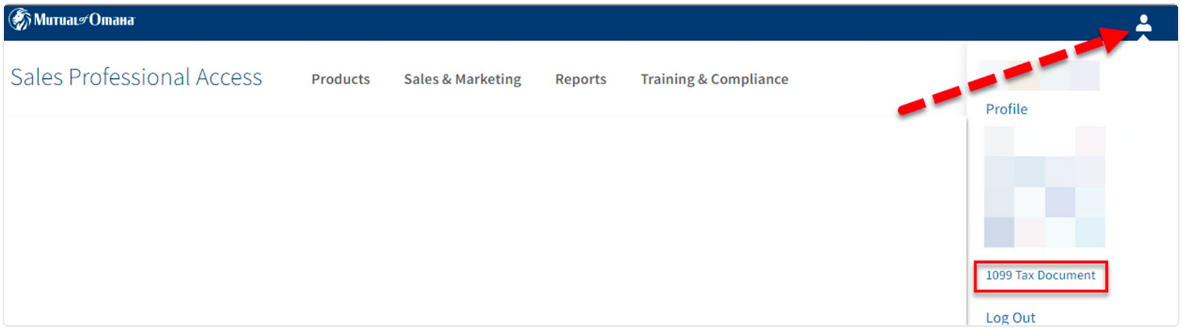
Compensation Information

To find detailed commission statements, select the **Reports** tab. On the Reports page, scroll down to the Compensation Brokerage section to see your latest compensation statements.



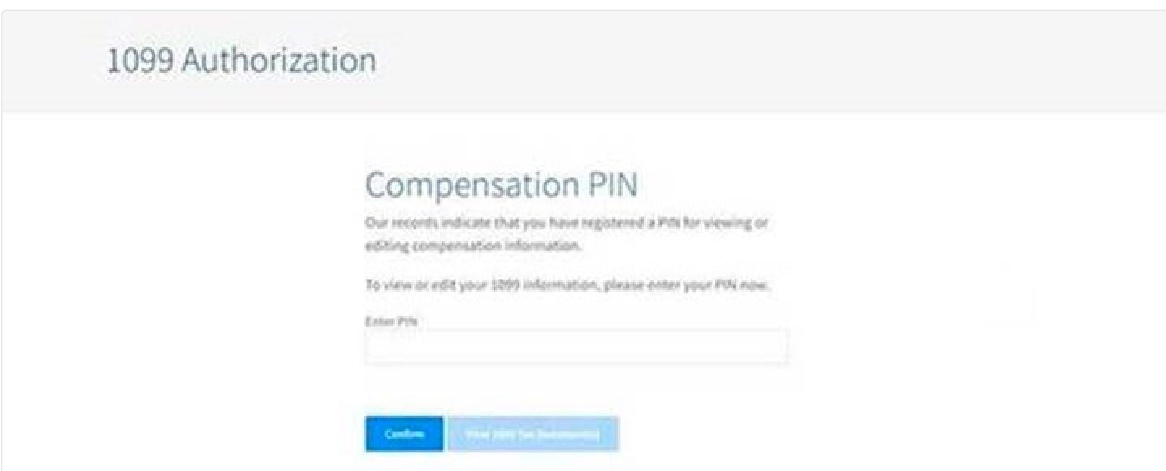
1099 Tax Document

From the SPA home page, click on your **Profile** icon and click “1099 Tax Document” under the profile drop down.



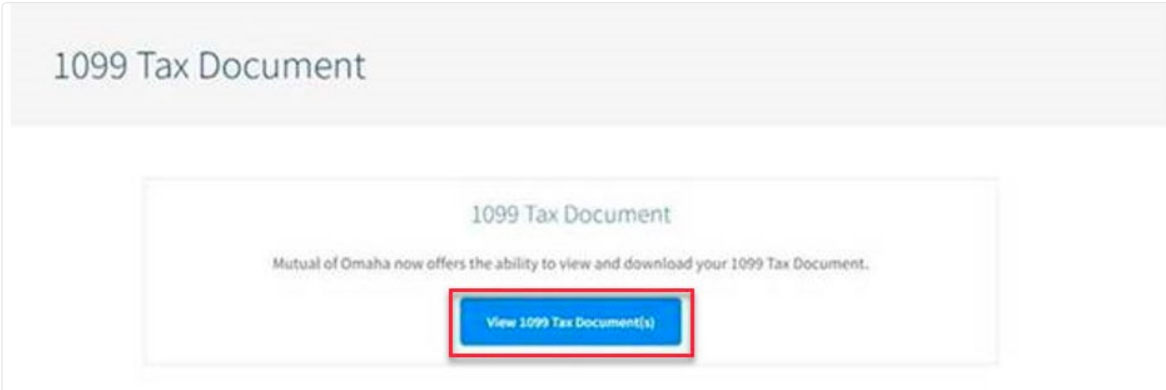
You may also access the link through the **Reports** tab by clicking on the “1099 Tax Document” link.

If a Compensation PIN has been created, the following screen is displayed:



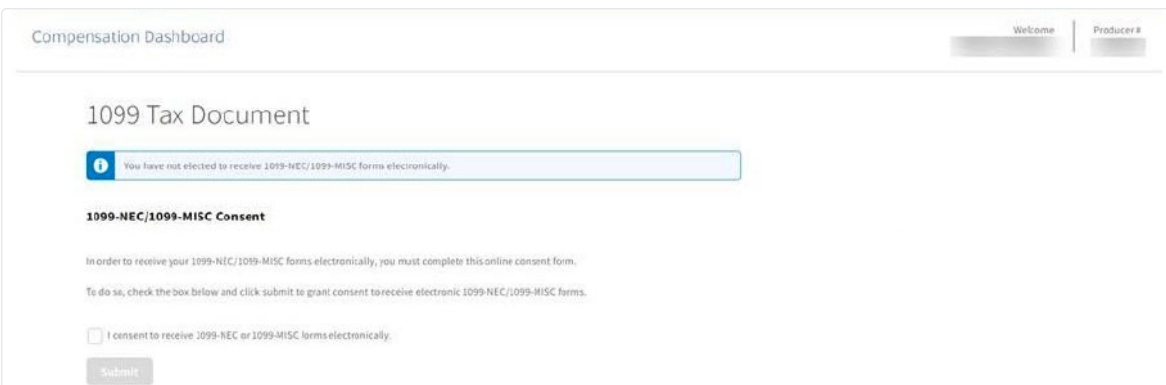
After the PIN is entered, the producer must click on View 1099 Tax Document.

After entering the PIN, the following screen will come up. **If you do not have a Compensation PIN, the following screen comes up directly.**



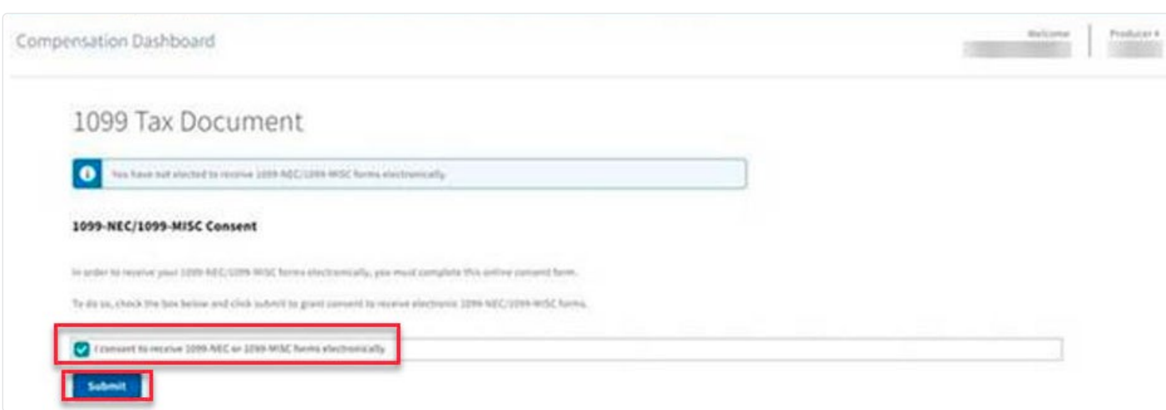
After clicking on the View 1099 Tax Document(s) button on the screen above, the next screen will ask for consent to receive 1099s electronically.

During the first view of the 1099 Tax Document application, having not yet elected to receive 1099 forms electronically, you will see the following:

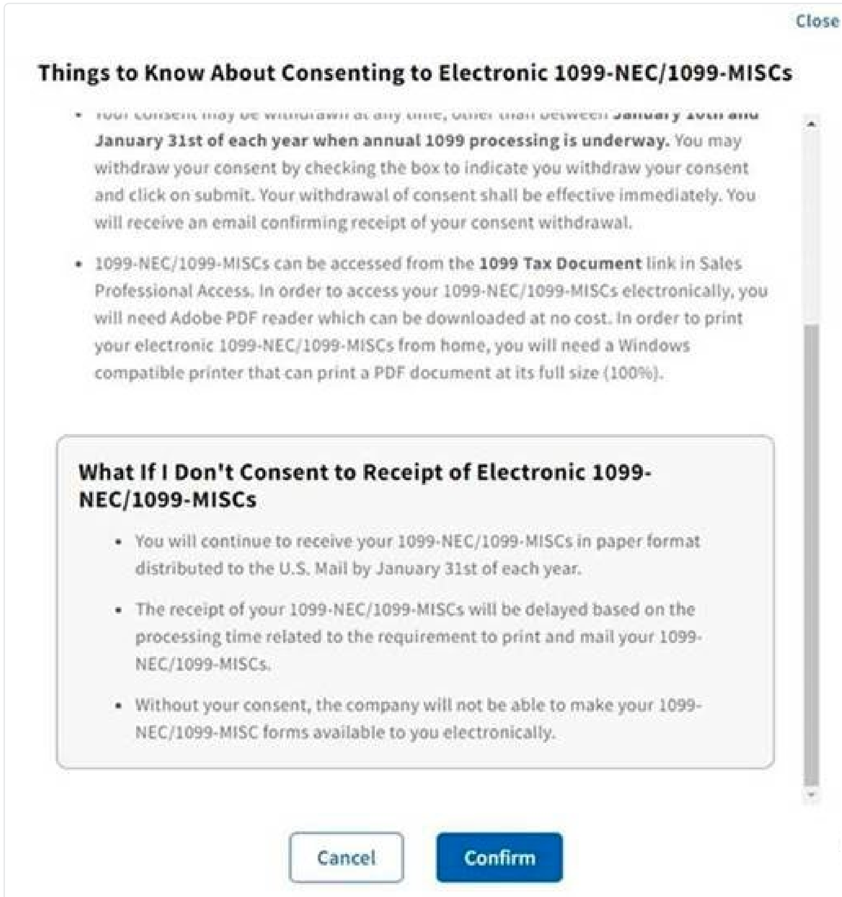


The first step to consent. Click on the box to consent, then click on submit.

Note: Upon consenting to receive 1099s electronically, you will no longer receive 1099s in the mail. If you want them electronically, then proceed.



After submitting, the terms and conditions are displayed. From this screen scroll down for the Confirm button to become blue and eligible to select.



Below is the view after confirming to receive 1099s electronically. One 1099 is showing in the screenshot below, but you may have multiple 1099s available.

You may choose to “View” your 1099 or “Download” it for filing, printing, etc.

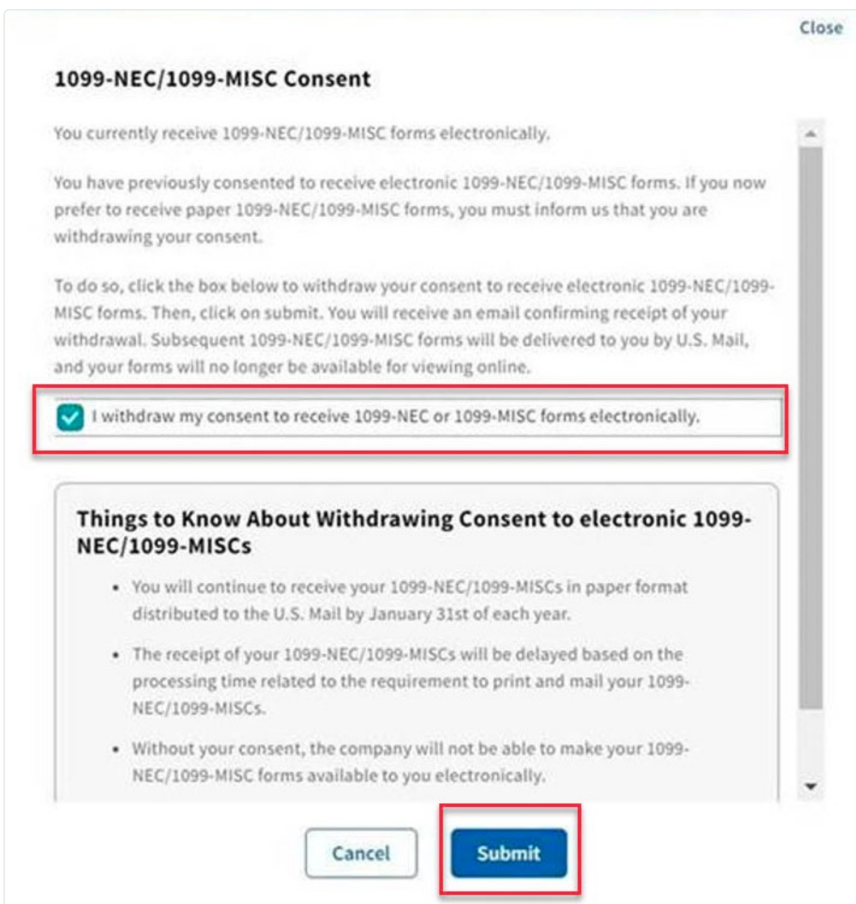
As a reminder:

- If you **opt-in**, you will only receive your 1099s on SPA electronically and will **no longer** be mailed a 1099 through the U.S. Postal Service (USPS)
- If you **do not opt-in**, you will be mailed your 1099s, and **will not** be able to view them on SPA

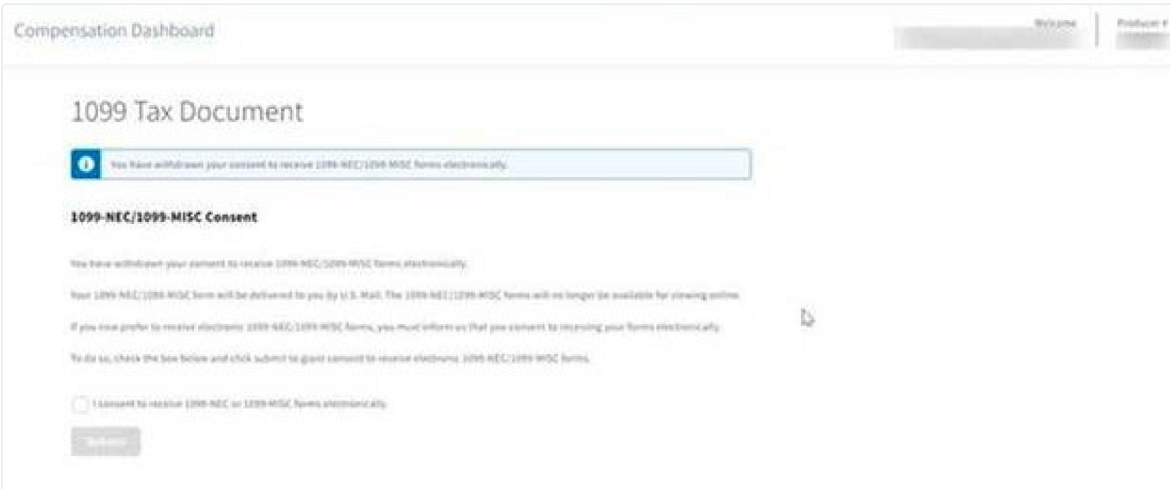
Note: You may also elect to opt-out of receiving 1099s electronically at any time, and your 1099s will be mailed through USPS. You may choose either option, but viewing 1099s on SPA electronically ***and*** *having them mailed through USPS* ***is not*** *one of the options.*

When clicking the link to withdraw consent, the following screen will be presented:

To withdraw consent, click in the box. The Submit button will then turn blue. Click Submit. You may choose to "View" your 1099 or "Download" it for filing, printing, etc.



The following screen will be displayed indicating you have withdrawn consent to receive 1099s electronically.



Administrative Assistant

Note: Assistants do not have ability to consent or withdraw consent.

If you have **opted in** to receive a 1099 electronically, the assistant will be able access as explained above. Only assistants with **full permission** in SPA will be eligible to view the 1099s.

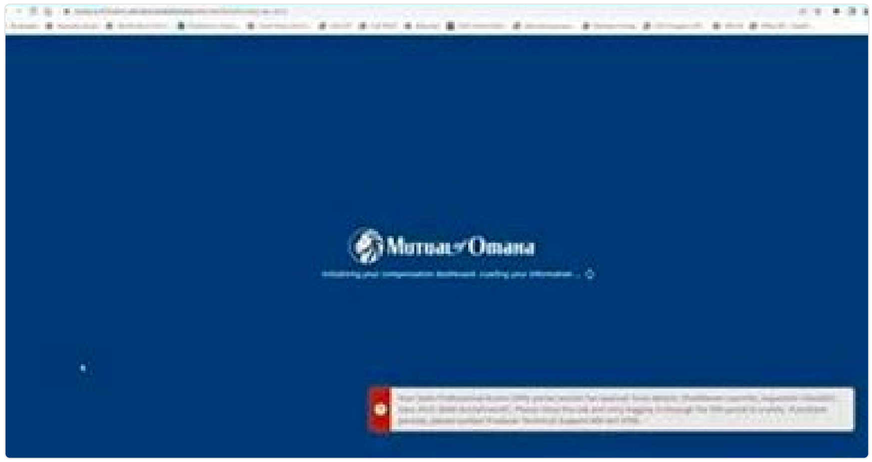
If you have not **opted in** or have **opted out**, then the assistant **will not** be able to access or view 1099s through SPA.

If you have a Compensation PIN assigned for SPA already, the assistant will need the Compensation PIN to access the 1099. Without the Compensation PIN the assistant **will not** be able to view the 1099s.

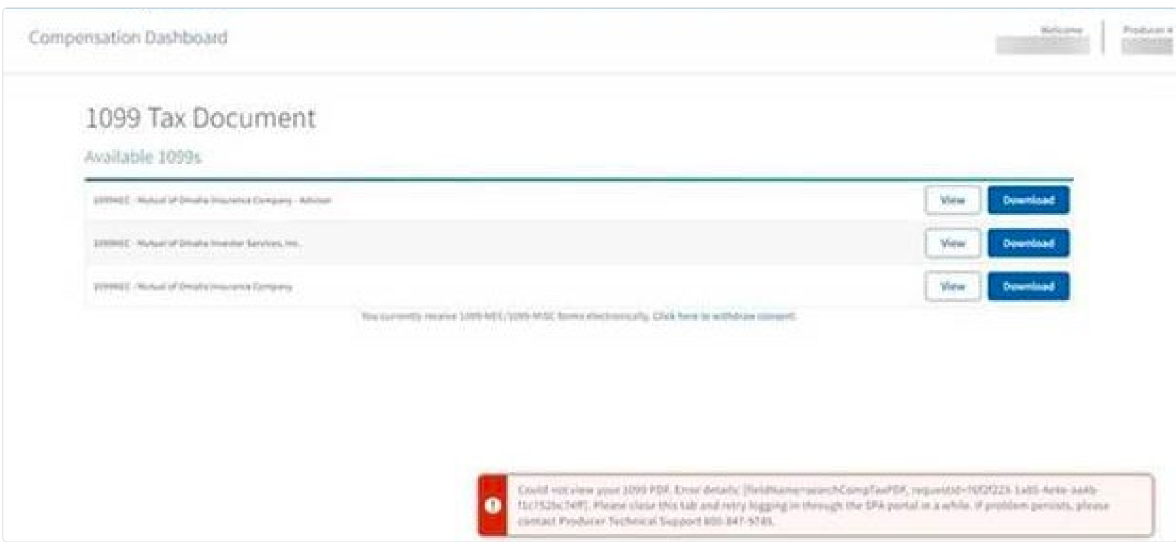
An assistant will see the following when you have elected to receive 1099s electronically:

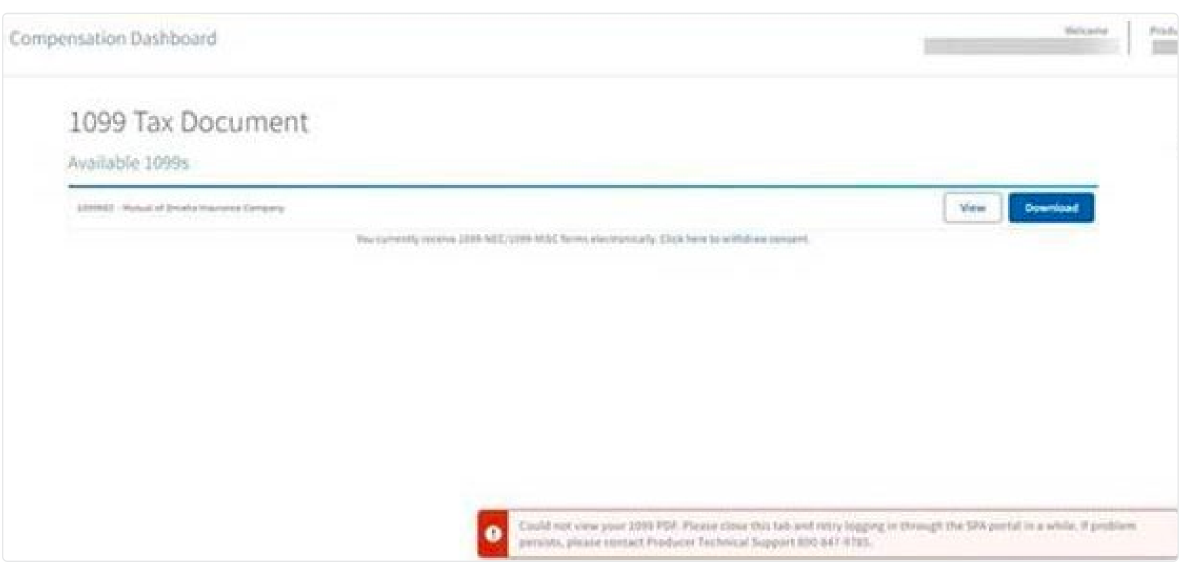
If errors should be encountered while accessing the 1099s in SPA, please contact Technical Support at 800-847-9785. Please provide them with screen prints of the error(s) if encountered.

This is a sample error message that appears when a SPA session has expired:



Below are sample error messages that may occur, such as a problem retrieving 1099 to display:





1099 Tax Document Application FAQs

Q: What if I am a producer with an assistant, and my assistant receives receive the error "Portlet Not Available" when clicking on the link to the 1099 Tax Document application?

A: An assistant with moderate or limited permission levels are not eligible to access the 1099 Tax Document application. Only assistants with full permission levels are eligible to access the 1099 Tax Document application.

Q: Why doesn't my assistant have the link to provide consent to receive my 1099 tax document electronically?

A: Assistants are not eligible to consent to the 1099 Tax Document application. The producer themselves will need to login and provide consent.

Q: Why am I receiving an error message when selecting a choice from the 1099 application online?

A: For security, there is a 10 minute timeout. When no activity occurs for 10 minutes in the 1099 application, you are logged out and must start a new session.

Q: Why am I receiving a message that an error occurred, "Could not save your action. Please close this tab and retry logging in through the SPA portal in a while. If the problem persists, please contact Technical Support 800-847-9785."?

A: This could be that the user has been inactive for over one hour from SPA sign-in and timed out. They will be logged out of the 1099 application and need to sign back into SPA if they want to continue. The error message may also report error details. Please request the user supply a screen print of the error message, it will be helpful when researching the error if signing back into SPA does not resolve the error.

Q: When my assistant is logged into SPA and enters the 1099 application, why is the assistant name displayed under Welcome, but the Production number reflects those they are assisting?

A: The Production number field will reflect the number that the assistant is "viewing as" from SPA. A future enhancement will include a Name field to display the name associated to the number.

Contact

Sales Support

Phone: 800-693-6083

Email: sales.support@mutualofomaha.com

Hours: Monday - Friday 8 a.m. - 5 p.m. (CT)

Contact Sales Support for:

- Product Questions
- SPA Questions
- Illustration Support
- Ordering Materials: Including Customizable Marketing Materials
- As a Gateway to All Departments