

A man with a beard, wearing a light blue button-down shirt, is sitting at a desk in an office. He is looking at a laptop screen and smiling slightly. The office has large windows in the background, and there are some plants on the desk in the foreground.

## Getting Started with Mutual of Omaha

For producer use only. Not for  
use with the general public.



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# Introduction to Sales Professional Access (SPA)

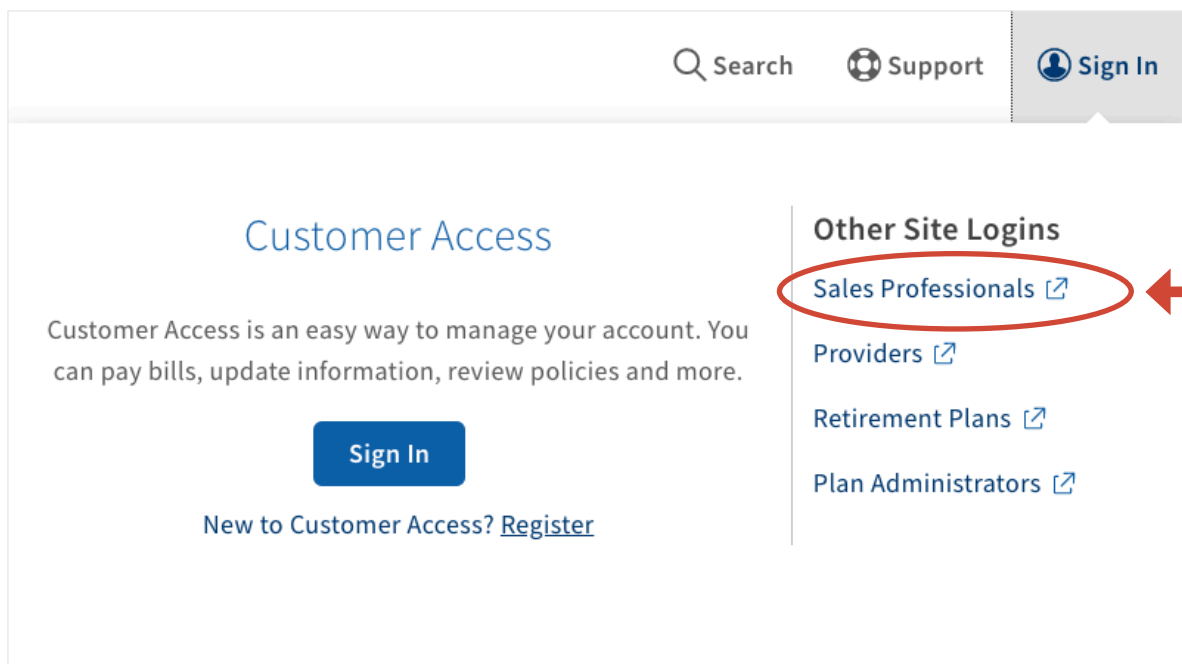
Sales Professional Access (SPA) is your one-stop shop to find all the resources you need at Mutual of Omaha.

## After logging in you can find:

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

## How to Register on SPA

- Open Chrome or Internet Explorer and enter [www.mutualofomaha.com](http://www.mutualofomaha.com) in the address bar.
- Choose Sales Professionals



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

## Welcome to Mutual of Omaha!

Please fill in the fields below to register for access to Sales Professional Access.

Production Number:

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"


## Welcome to Mutual of Omaha!

Please fill in the fields below to register for access to Sales Professional Access.

Production Number:

Date of Birth (MM/DD/YYYY):   ←

By accessing, viewing, or using the material on the Mutual of Omaha Companies Web site, "mutualofomaha.com," or by your registration to use the secure sales professional access systems, services and materials, you indicate that you understand and intend to be bound by the "[Terms and Conditions of Use](#)". You further agree to accept such [Terms and Conditions of Use](#) and agree to be legally bound by them. If you do not agree, you are not granted permission to use these Web sites and should exit immediately.

I Accept Terms and Conditions   ←

- Create your account

## Let's create your account.

Already have an account? [Sign in](#)

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First Name	Username
<input type="text"/>	<input type="text"/>
Last Name	Password
<input type="text"/>	<input type="password"/>
Email Address	Strength
<input type="text" value="agent@gmail.com"/>	Confirm Password
Confirm Email Address	<input type="text"/>
<input type="text" value="agent@gmail.com"/>	<input type="checkbox"/> Show Passwords

## Protecting your information is important to us.

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

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<h3>Security Questions</h3> <p>Select an appropriate security question.</p> <p><input type="text" value="Select a security question"/> <input type="button" value="v"/> <input type="button" value="v"/></p> <p>Answer</p> <p><input type="text"/></p> <p>Select an appropriate security question.</p> <p><input type="text" value="Select a security question"/> <input type="button" value="v"/> <input type="button" value="v"/></p> <p>Answer</p> <p><input type="text"/></p> <p>Select an appropriate security question.</p> <p><input type="text" value="Select a security question"/> <input type="button" value="v"/> <input type="button" value="v"/></p> <p>Answer</p> <p><input type="text"/></p>	<h3>Security Image &amp; Phrase</h3> <p>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.</p> <p>Select a security image.</p> <p><input type="button" value="Select an Image"/></p> <p>Please provide a security phrase.</p> <p><input type="text"/></p>
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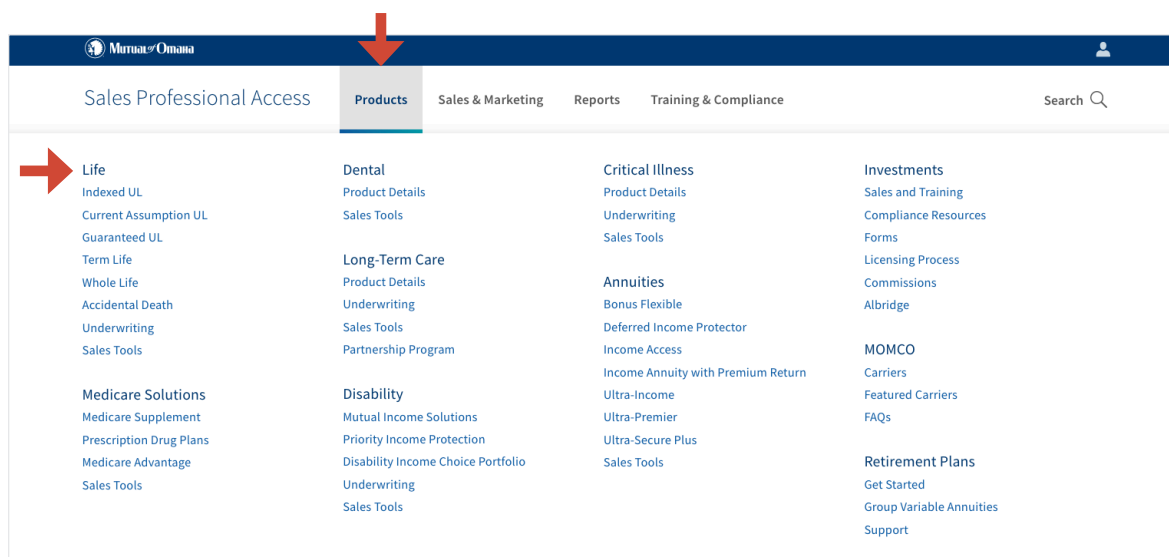
You are now registered.

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

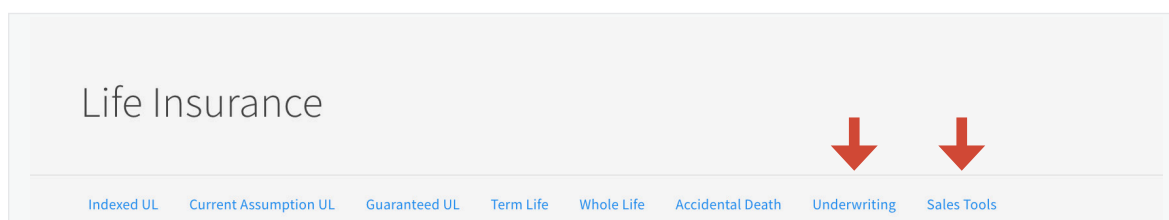


## Product Information

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 each life insurance product Mutual of Omaha offers.



The **Underwriting** tab provides information on our Underwriting guidelines, FIT credit 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 screenshot shows the SPA navigation bar with the following tabs: Sales Professional Access, Products, Sales & Marketing (selected), Reports, and Training & Compliance. The dropdown menu for Sales & Marketing is open, showing the following options:

- National Advertising
- Prospect
  - Advanced Markets
  - Association Marketing
  - Concept Marketing
  - Marketing Lists
  - Small Business Marketing
  - Social Security Program
  - Minimizing Taxable Income in Retirement
- Connect
  - Company Collection
- Rewards
  - LTC Marketing Credits
  - Med Supp & Dental Marketing Credits Program
  - Mutual Sales Leaders
- Forms & Materials (indicated by a red arrow)
- Electronic Applications
- WinFlex

The Forms & Materials page will now be displayed

The screenshot shows the Forms & Materials page with the following search interface:

**Forms & Materials**

Basic Search Search By Form

**Company**

**Service Type**

**State**

**Product Type**

**Product Name**

[Reset](#)

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 (brochure, highlight sheet)
  - **Prospecting**  
Materials that help find/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.

**Forms & Materials**

**Search Results (48)** [Start New Search](#)

**CARRIER**  
United of Omaha

**PRODUCT NAME**  
Term Life Express (Simpli...

**STATE**  
Nebraska

Document Name	Description	Notes
<a href="#">LAP1111_NE_0613</a>	Application for GULE, TLE and IULE	Application for Simplified I sign. Contains Checklist, ABR Disclosure form, Conc special forms.
<a href="#">L6232_0513</a>	Replacement Notice	Please Print: Must be completed on the application in the "Replacement Section" even
<a href="#">L7421</a>	United Life App Submission Form	Print from SPA: Use for sub Life Transmittal Form
<a href="#">L5847_0203</a>	Life Insurance Buyers Guide	Please Print: For all Life Pro To be given to the Consum

**Show Forms Package (3)**

**Forms Package**

- [LAP1111\\_NE\\_0613](#)
- [L6232\\_0513](#)
- [L7421](#)

[Email](#) [Print](#)

**To view an item**, click the form number listed under "Document Name." You can save the documents to your computer, emailed or print it off. 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.

**Search Results (48)** [Start New Search](#)

**CARRIER**  
United of Omaha

**PRODUCT NAME**  
Term Life Express (Simpli...

**STATE**  
Nebraska

Document Name	Description	Notes
<a href="#">LAP1111_NE_0613</a>	Application for GULE, TLE and IULE	Application for sign. Contain ABR Disclos special form

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

## Quoting

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

### Here's how to access **Mobile Quotes**

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



### 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 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

## 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 the your cases.

**Case Status**

Life & Annuity: [Cases](#) | [Summary](#)

Health: [Cases](#) | [Summary](#)

Find a summary of cases by Production Number

Life & Annuity  Health

OR

Find a case by Policy Number

## Policyholder Information

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

**Clients**

[Policyholder Information](#)

There are three ways to search for policy information: policy number, first initial and last name, 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.

**Search for a Client**

Search by  Policy Number

## 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.

# Contact

## Sales Support



Phone: 800-693-6083



Email: [sales.support@mutualofomaha.com](mailto:sales.support@mutualofomaha.com)



Hours: Mon - Fri 8:00am - 5:00pm (CT)

### Contact Sales Support for:

- Product Questions
- SPA Questions
- Illustration Support
- To Order Materials - including customizable marketing materials
- As a Gateway to All Departments