

Life Products

Interim Policy Output FAQ

*Last Update:
March 30, 2020*

Q. How will I know if there are delivery requirements?

- A. An email will be sent to your office contact at time of policy issue listing any needed delivery requirements. The email will also list options for delivery, including:
- By mail: A return envelope will be included for the customer to return to our Home Office.
 - By fax: 402-997-1850
 - By email:
liferequirements@mutualofomaha.com

Q. Will the back office and/or producers get a copy of the policies and delivery requirements to be able to assist their clients with questions (mail or PDF format)?

- A. An additional copy of the policy package will not be sent to the back office nor to the producer. This includes PDF copies via email. We will update you as this status evolves.

Q. Will we provide tracking information on the policies when they are sent to the client?

- A. Policies will be sent via USPS; therefore, there will not be a tracking number for mailing. Policies will be mailed the business day following policy issue.

Q. How can you track when delivery requirements are received and premium payments are applied at Mutual of Omaha?

- A. Case Monitoring will reflect outstanding delivery requirements, received delivery requirements and premium payments.

Q. If we find that a policy was issued incorrectly, what will be the process?

- A. Please contact your New Business team to request policy corrections.

Q. How do you send secured information via email?

- A. If you are using a major email provider such as Microsoft (Outlook, Hotmail), Gmail or Yahoo, your emails are being encrypted and you are sending documents securely.

If you use an email address with a company domain name such as, agentname@companyname.com, make sure your company has an established TLS feed. Most do, but if you are unsure, please contact your Sales Director or Account Executive.

Q. What can be done if the client is quarantined somewhere other than their home?

- A. Please notify Underwriting immediately if you are alerted to your customer being quarantined for further direction.

Q. Will instructions be included with the policy kit explaining to a policyholder where to sign, and what/where to send?

- A. A Customer Letter will be enclosed outlining where to send the requirements. An envelope is also included in the policy kit for the client to submit delivery requirements back to our home office. Detailed instructions on each requirement are not included.

Q. Will the policy kits include pre-paid postage envelopes to clients to return delivery requirements?

- A. No, postage will need to be paid by the client.

Q. What is the process for the Delivery Receipt States?

- A. CA, LA, SD, WV: As we are mailing direct to the customer, we will not require a signed delivery receipt.
VA: We will need the customer to submit the signed delivery receipt using the envelope provided.

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