

E-Delivery Guidelines



Name: E-DEV Guidelines 2013
Approval Code:1359728937
Approval Date: 02/01/2013

E-Delivery Guidelines

- ▶ SureBridge is excited to announce the success of it's recent E-Delivery program!
 - **68% of customers** have their documents delivered electronically
- ▶ Customers can request electronic delivery of their welcome packet.
 - Including policy print, app, and all ID cards **except Vision** at the point of sale. *Vision ID cards will be sent separately by EyeMed regardless of selecting E-Delivery.*
 - The customer will get an email linking them to the WWW.Chesapeakeplus.com website
 - Securely retrieve their documents
 - This means faster policy delivery and lower overhead for the company

E-Delivery Guidelines


- ▶ For this method of delivery, there are guidelines to follow when selecting this option:
 - ▶ **Do** include the Customer's email address on the application
 - **NOT YOUR OWN OR ONE YOU CREATE FOR THE CUSTOMER**
 - ▶ **Do** verify the Customer's email address carefully
 - ▶ **Do not** record your own email address or a false email address on the customer's application
 - **Your customer will not receive their materials**
 - Raises a flag for suspected fraud
 - You and/or your customer will be contacted by the Home Office Fraud Team
 - Also a HIPAA violation

Even though you believe you are providing additional service, many customers are either not receiving their materials or lodging complaints against their Agent. **DO NOT** risk your career!

E-Delivery FAQ's

- ▶ Tell the customer about E-Delivery at the very beginning of the application process.
 - The option to select e-Delivery comes up much later in the application process.
 - This selection **will not** re-verify the email address.
- ▶ If your customer does not get an e-mail linking them to their document(s):
 - He/she must contact customer service at 1-800-815-8535 to update their information and get access to their documents.
- ▶ I.D. Cards **will not** be delivered to your customer if E-Delivery is selected.
 - If the customer wants a pre-printed card or any printed documents mailed from the Company, they should **not** select E-Delivery.

What E-Delivery Looks Like



SureBridge Insurance | Home

Applicant Information » Health and Underwriting Information » Billing Method Information » Payment Information and Required Forms » Finished

[Hand-off application to agent](#) | [View Current Application PDF](#)

Consent to Electronic Delivery of Documents

You may receive certain documents related to your insurance Policy electronically.

If you so choose, you will receive an email that provides a link to your documents and instructions to access those documents. You may withdraw your consent to receive documents electronically at any time and receive paper documents at no charge by notifying Chesapeake.

By your consent you confirm that you will be able to access the electronic documents. Do you consent to receive / access copies of your Documents, including the Documents in this enrollment, electronically?

* Yes No

To update your email address or to withdraw your consent to receive electronic documents, please contact us at 1-800-815-8535 or by email at suppmembersupport@chesapeakeplus.com

In Summary

- ▶ E-Delivery is a great way to provide your customers with all fulfillment material as quickly as possible.
- ▶ Use the customer's email—not yours or a made up one.
 - Leads to customer not receiving their materials
 - Will trigger an investigation
 - Can lead to consumer complaints
- ▶ This tool can be a value addition if used correctly.