

wellabe®

Great Western
Insurance Company
A Wellabe Company

MyEasyClaim®

User Guide



Introduction

MyEasyClaim[®] enhances the claims submission process by:

- Offering a seamless, self-service experience to submit and manage claims online every day* with 24/7 access and real-time estimates
- Streamlining the claims process with improved simplicity, speed, and accuracy
- Digitizing documents and claims-related correspondence
- Providing the ability to accept e-signatures
- Featuring exactly which forms are needed, including state variations, to process each claim
- Sending notifications throughout the entire process to keep you informed and able to monitor the progress

MyEasyClaim gives you the flexibility to:

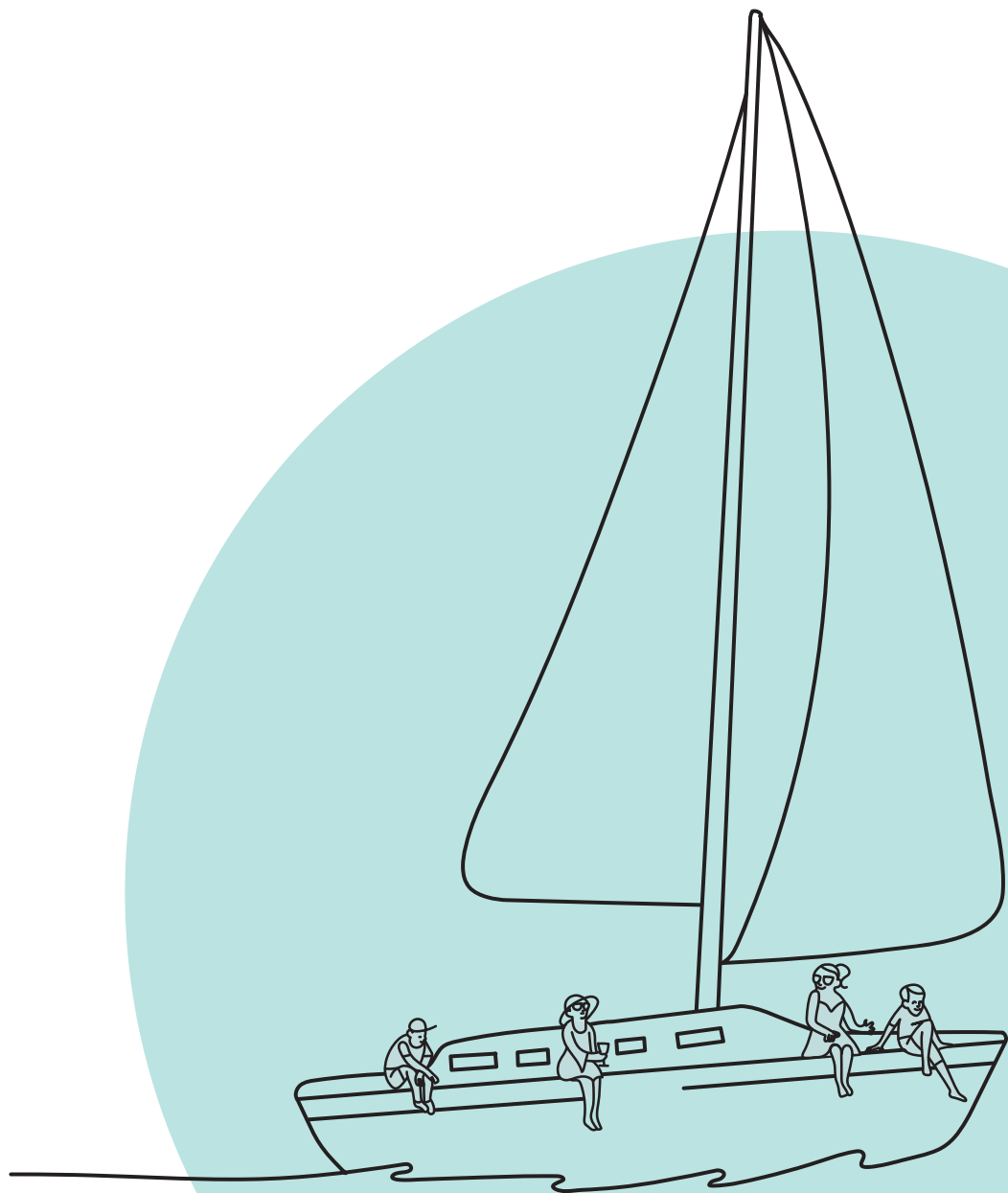
- Access claim information from your computer, tablet, or smartphone
- Get started quickly by simply logging in to Wellabe's agent portal and clicking on the "MyEasyClaim" icon
- Conveniently request accurate and real-time claim estimates any time of the day, instead of waiting to call us during business hours
- View claim payment information, including the type of payment, date of payment, and the payment recipient

This user guide is designed to help you use MyEasyClaim.

*MyEasyClaim runs system updates Monday through Friday from 6 to 8 p.m. Central time. During this time, the system is not available.

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Overview of screens

The following section outlines the various screens of MyEasyClaim.

Policy search

If you're a contracted funeral home, the policy search allows you to find your claims. If you're an uncontracted funeral home, you can use the "No policy found" option to submit claims (See the "file a claim as a non-contracted funeral home" section for a screenshot).

My claims

Contracted funeral homes can search claims that are in process and see the status of each claim.

Claim statuses

Each claim will display a status level.

- Needs requirements: Indicates there are outstanding requirements that need to be completed.
- Active: No notice of claim has been received.
- Pending review: Notice of claim has been received and is waiting for the claims examiner's initial review.
- Ongoing claim: This is a contestable claim that has some benefit eligible.
- Settled: Claim benefit has been sent from the payment vendor to the beneficiary.
- Ready to pay: Claim is in process and being verified for accuracy.

Claim information

This section displays:

Claim details

- Claim status
- Insured name
- Benefit amount
- Quote date
- Policy number
- Funeral home

Funeral home info

- Funeral home (name)
- Address
- Email address

View checklist

This indicates required documents to be completed and any other documents uploaded.

- Death claim form
- Certified death certificate
- Other state-specific requirements and any additional riders

Customer support

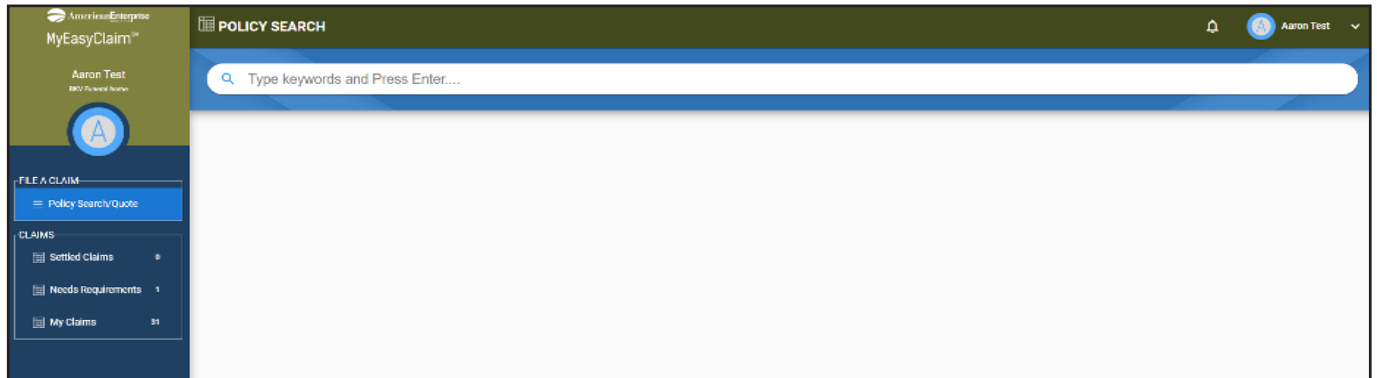
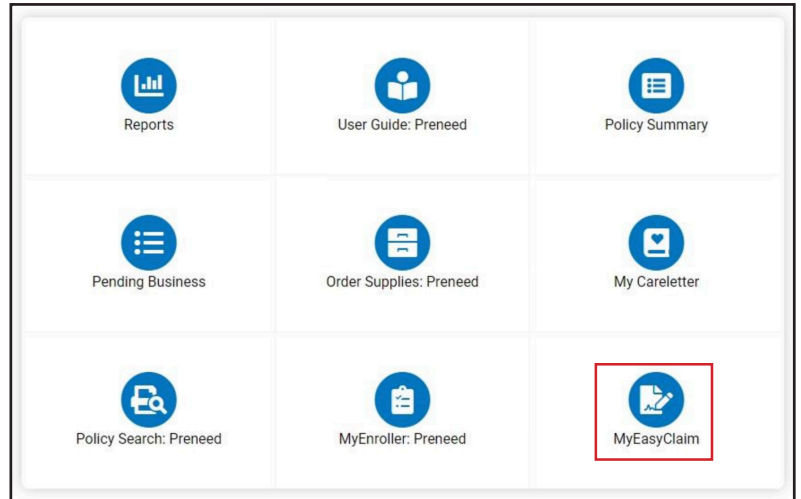
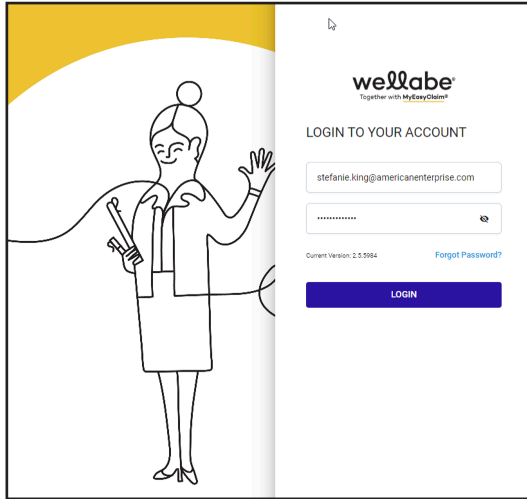
This allows you to contact the claims team with any additional questions.

Back

This takes the user back to the previous screen.

How to get started

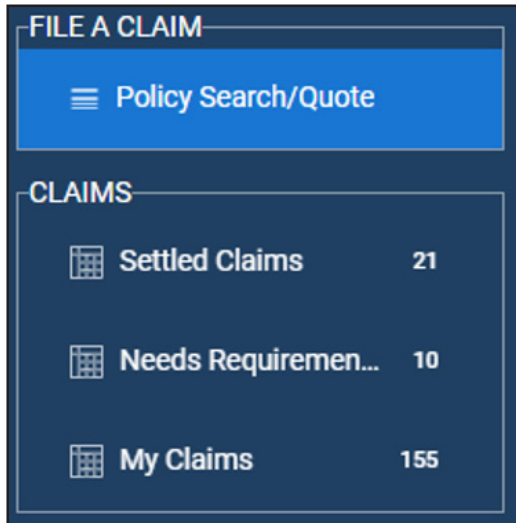
1. Log in to the agent portal at wellabe.com/signin, and click on the “MyEasyClaim” icon. You will be taken to the MyEasyClaim policy search screen.



File a claim or generate a quote as a contracted funeral home

This section is a step-by-step guide for filing a claim or generating a quote as a contracted funeral home.

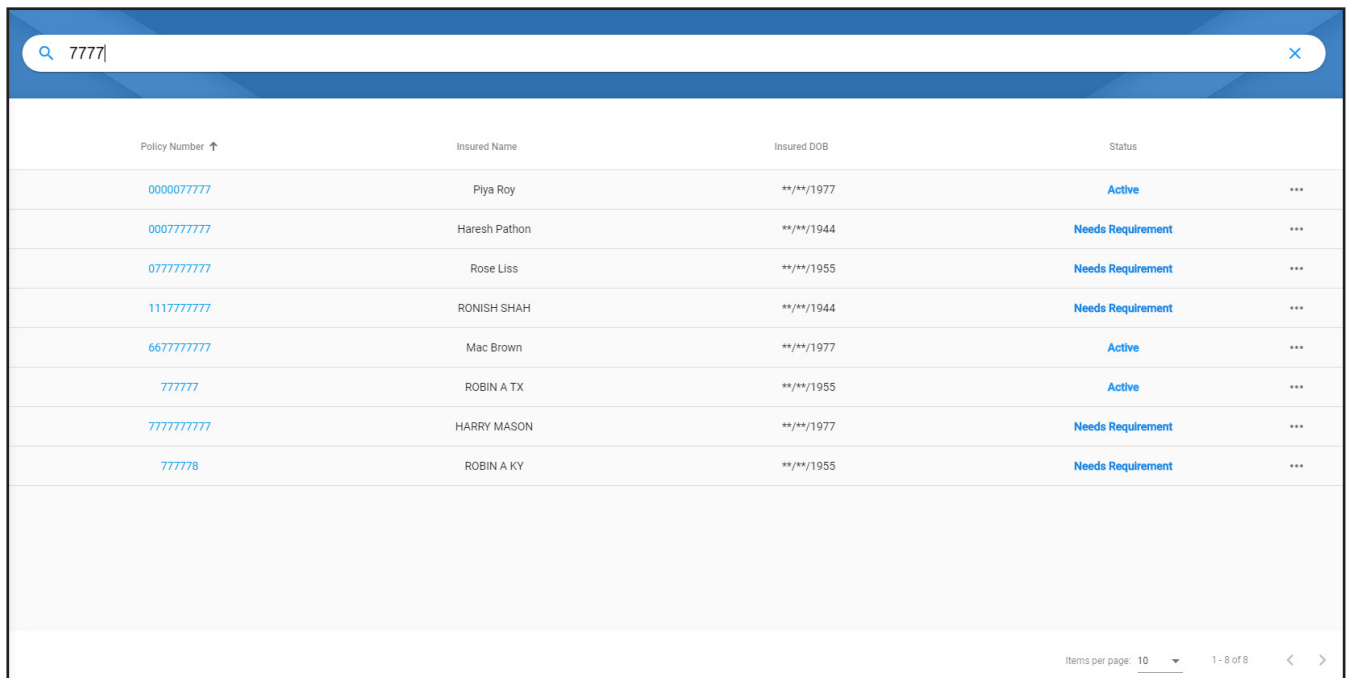
1. After logging in, select “Policy Search.”



2. Enter the policy number or keyword. The field requires a minimum of four characters; if using the last name search, enter “!”, followed by the keyword. You can also search by the date of birth by using the format MM/DD/YYYY.



3. Click on the policy number of the claim that you want to start a claim on or the ellipsis and select “Begin Claim.”



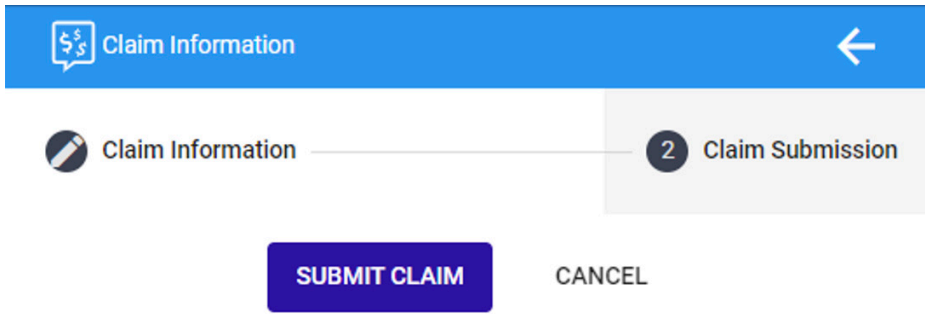
4. Enter the required information on the “Generate Quote” screen:

- Date of death
 - Cause of death
 - Natural
 - Accidental
 - Suicide
 - The Away-from-home benefit question will only appear if the insured has coverage for that benefit. If the face amount is under \$2,000 or they have not purchased the rider, this question will not appear. Select “Yes” or “No.”
 - Select “Entire Benefit” or “Specific Amount.”
 - Complete any state-specific questions listed.
5. Receive the benefit quote. The quote may be subject to change in some scenarios.
NOTE: You may select “Cancel” to only receive the quote without filing a claim.

6. Click the “Start Claim” button.
7. Only the required fields to complete the claim will appear.
- If additional documents are required, click “Upload” and select the file.
 - Click on “Sign.” Type or sign the funeral home signature and tap “Submit” to add the signature.
 - Click to certify the information, and then select “Accept.”

The claim form will be generated on the next screen. Click on the image to view the document.

Then select “Submit Claim” to complete the claim process.



8. Funeral home info: This contains static information.

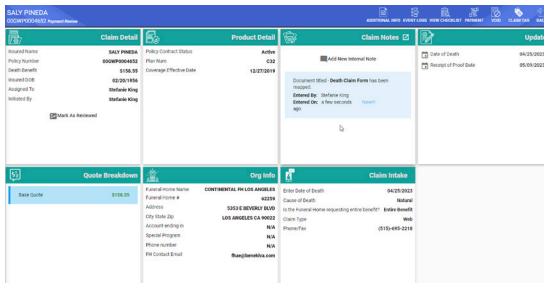
9. Once completed, you’ll receive a notice of completion, and the claim status will be changed to “Pending Review.” Once the claim is pending, you will see the following:



Death Claim Form

EMAIL DOCUMENT ...

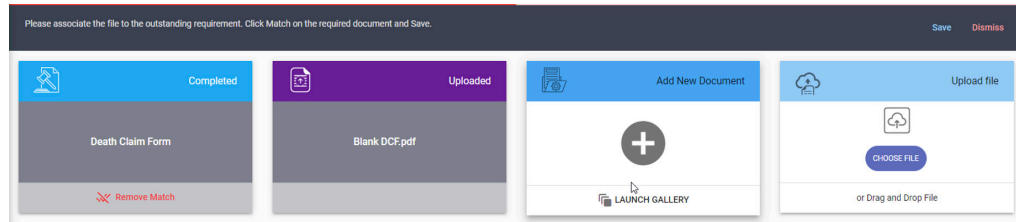
- Information on initial claim view: This page is the landing page for each claim. (NOTE: By clicking on the insured’s name in the upper left of this screen, you can go back to this initial view from the “View Checklist” and “Customer Support” screens.)



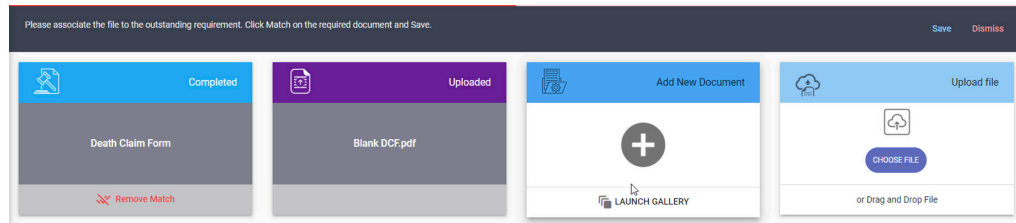
- Claim details: This contains static information.
- Funeral home info: This contains static information.
- Icons in top right of window
 - Beneficiary: This allows you to view beneficiaries on the claim.

Beneficiary			
Name	Address 1	Address 2	Action
JOHN SMITH	123 MIDDLE OF AVE	NOWHERE UT 84004	

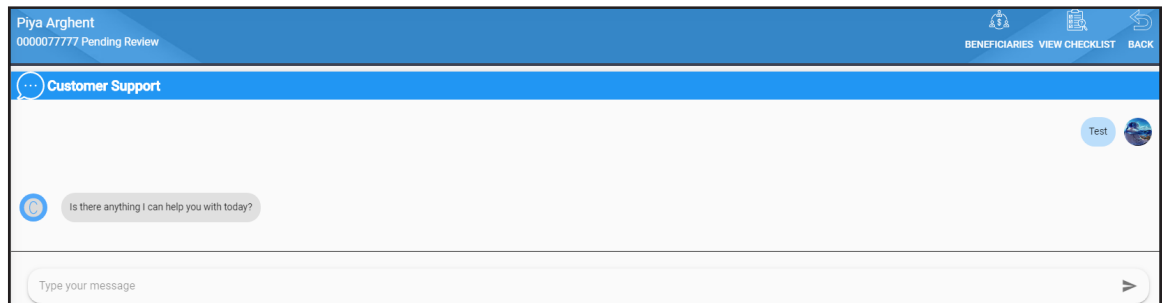
- **View checklist:** This is a link to the requirements page as well as the location to upload any other required documents. There may be additional requirements depending on state regulations. When an additional document is required, you will get the message below.



- Upload your form by clicking “Choose File” or drag and drop the file onto the screen.
- When the file is uploaded, click “Match This” on the box that matches that required document. If the document you are adding is not required there will not be an option to match.
- Click “Save” in the upper right corner of the screen and click “Submit Claim.”



- **Customer support:** You may use this link to contact the claims examiner with questions.

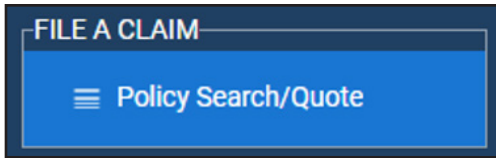


- **Back:** The “Back” icon takes you to the previous page. Once on the landing page for the claim, you’ll be taken out of the claim, even if you were previously on a different page.

File a claim as a non-contracted funeral home

The following instructions will guide you through filing a claim as a non-contracted funeral home.

1. After logging in, select “Policy Search” and enter the insured’s name or policy number.



- Beneficiary: This allows you to view beneficiaries on the claim.



2. Click “MyEasyClaim uncontracted funeral home claim intake.”



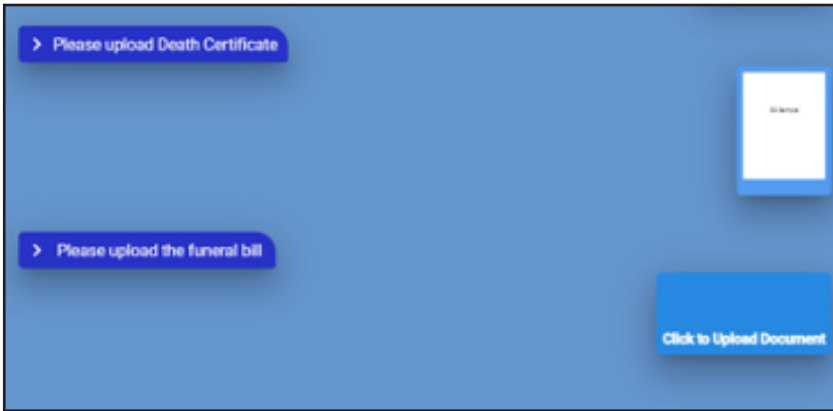
3. Complete the intake questions.



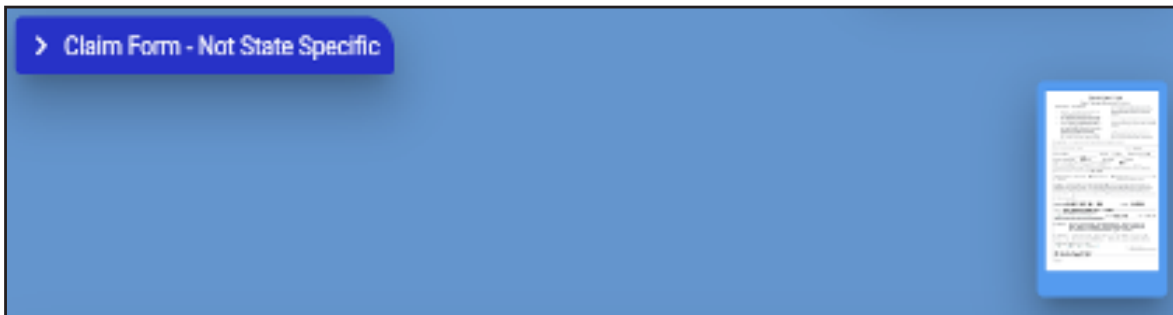
4. Collect the family and funeral home signatures with the electronic signature feature.



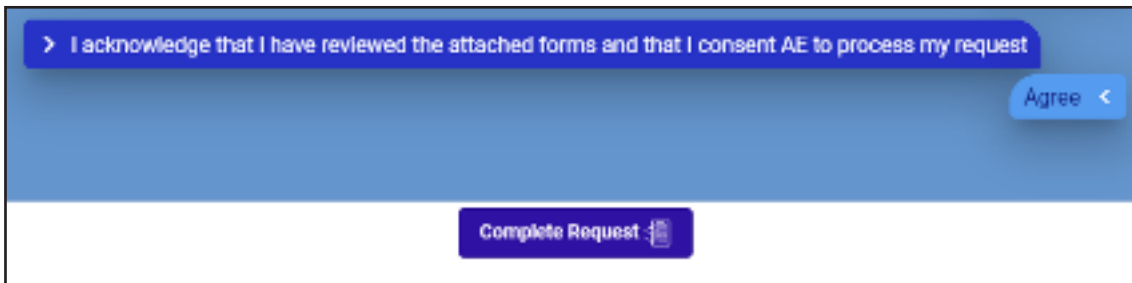
5. Upload the death certificate and funeral bill.
 - Click to upload document and select the file.
 - The files will be added to the intake.



6. After the intake is complete, the claim form will load with all the information.



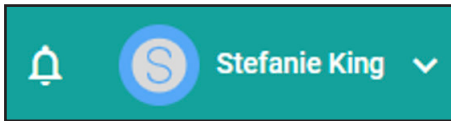
7. To complete the claim, select "Agree" and "Complete Request."



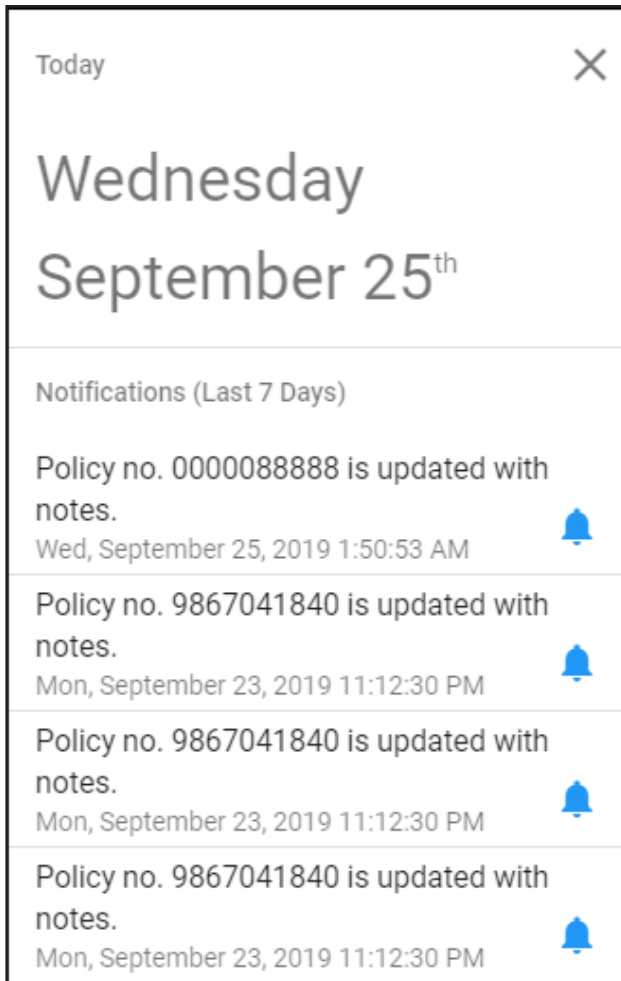
8. A file with all the documents will be generated to save or print for your records.
9. The file will be sent to the claims department for processing.

Additional features

1. Bell icon at top right of the screen:

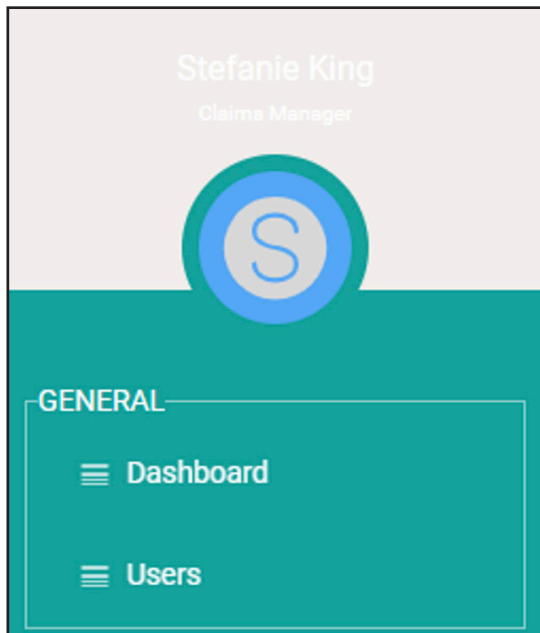


- Clicking on the bell will open a pop-out window on the left side of the screen that shows claim notifications.

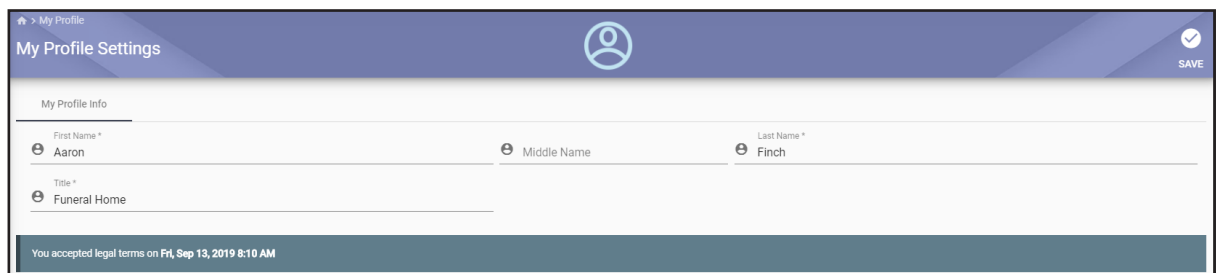


- Clicking on one of the notifications will take you to correspondence. You can respond to correspondence [here](#).

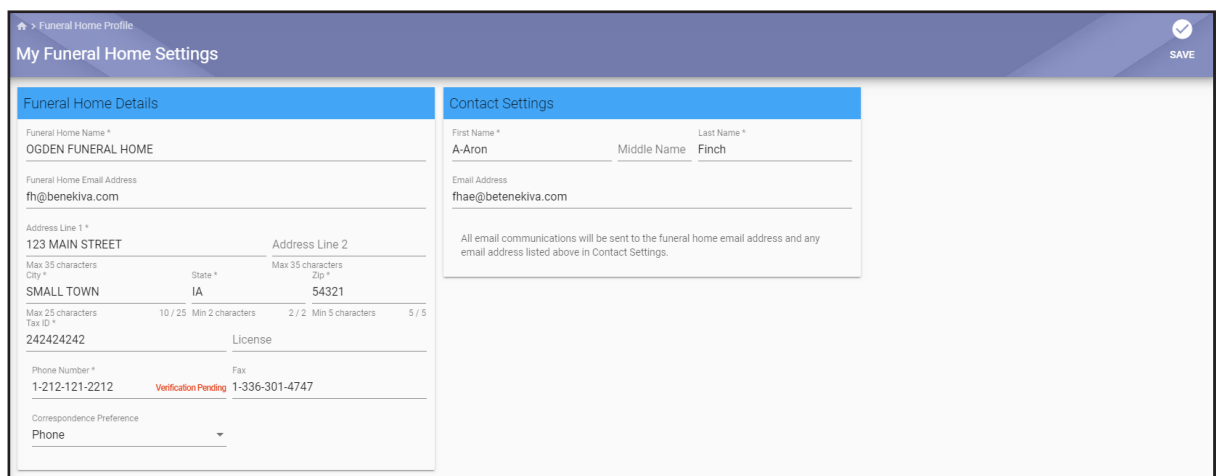
- 2. User name icon at the upper right side of the screen:



- Clicking on this icon opens a dropdown menu that contains the following items:
 - My profile: This includes profile settings.



- Funeral home profile: This contains settings for the funeral home.



- Tutorials: Walk-through videos to assist you with completing tasks are located here.
- Sign out: Click here to sign out of MyEasyClaim.

Thank you for using MyEasyClaim. It was designed to help you increase your sales by giving you access to faster quoting tools, easier claims submissions, and a convenient way to work on the go.

If you have questions or issues, contact Agent Sales Support at 866-689-1404, Monday-Friday, 7:30 a.m. to 6 p.m. Central time, or by email at agentsupport@wellabe.com. These representatives can answer software questions or notify the Help Desk, who will contact you to troubleshoot.

Thank you, and we look forward to earning your business.

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