Delaware Life®

Delaware Life OnePortal

User Guide - Quick Reference

Delaware Life OnePortal

User Guide - Quick Reference

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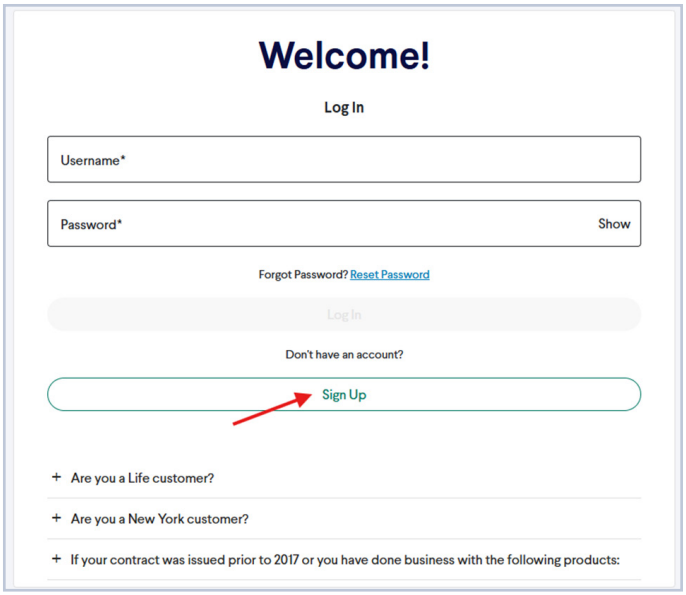
Search Documents 36

History 37

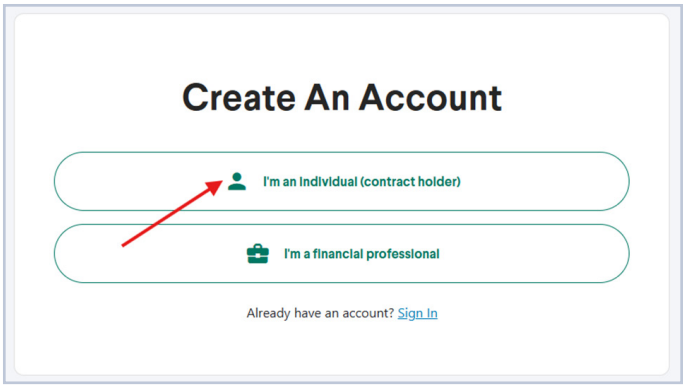
My Profile 38

Creating an Account on Delaware Life OnePortal

Individual (Contract Holder)



- To create an account, visit https://portal.delawarelife.io
- Select "Sign Up"



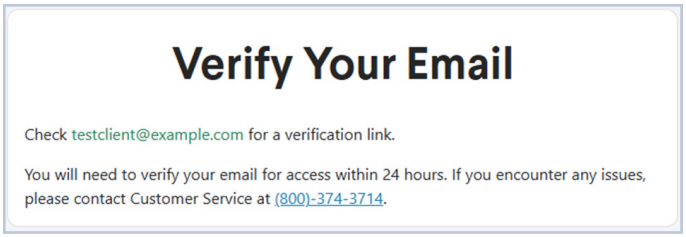
- Select "I'm an individual (contract holder)"

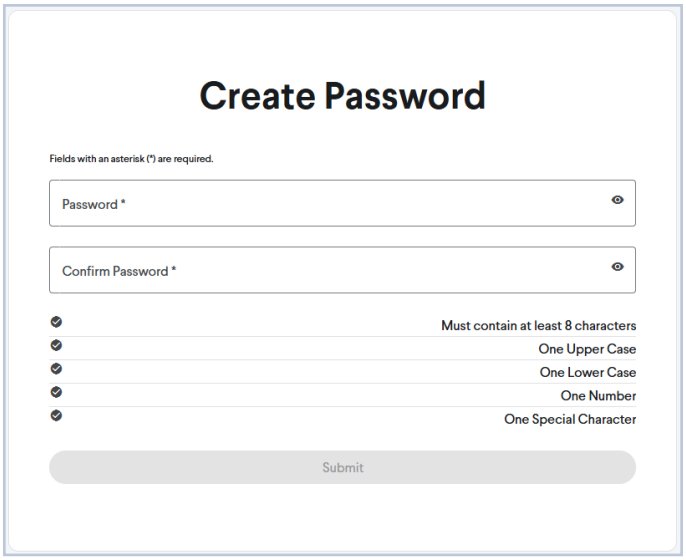
Creating an Account on Delaware Life OnePortal

Individual (Contract Holder)



- Provide the following information:
  - Email – the email you'd like to use for your account
  - Confirm Email – ensure you typed your email correctly
  - Contract Number – the contract number issued with your policy
  - Social Security Number (SSN) – as an owner of the contract, your SSN (or, if owned by a trust or corporation, the owner's TIN/SSN)

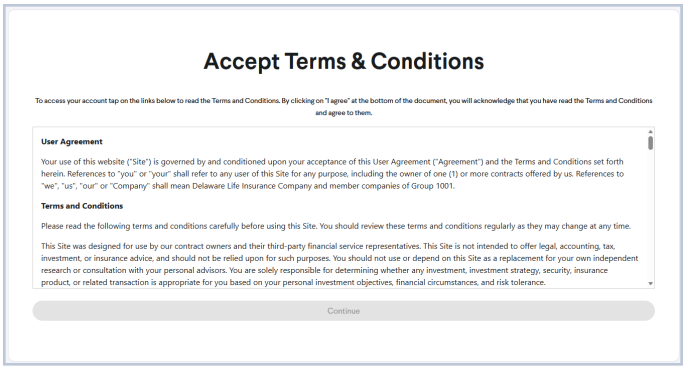


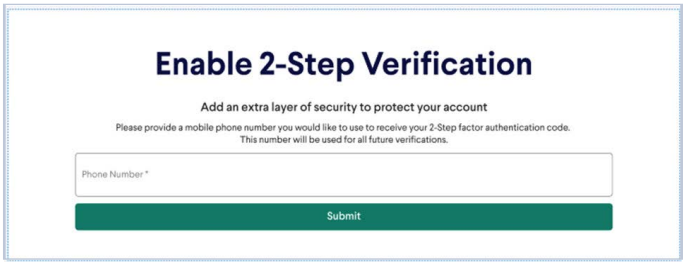


- A verification email will be sent to the email you provided
  - This is a time sensitive, one-time use email
  - For subsequent logins, please visit https://portal.delawarelife.io
- Select the button in this email to complete account setup:
  - Create a password
  - Accept Terms & Conditions
  - Setup 2-step verification

Creating an Account on Delaware Life OnePortal

Individual (Contract Holder)

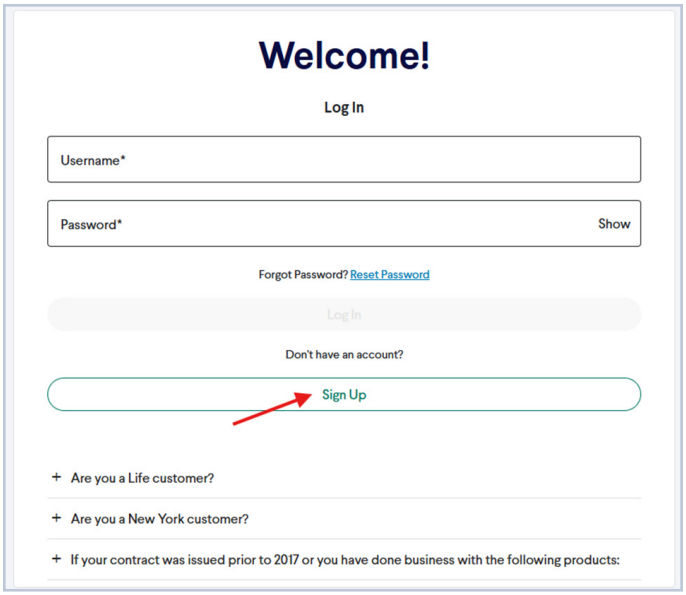




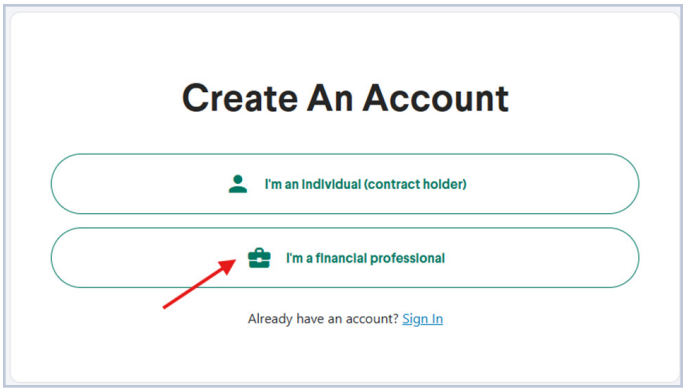
Having trouble? Contact us at 800-374-3714 (Mon to Fri 8:30am to 6:00pm EST)

Creating an Account on Delaware Life OnePortal

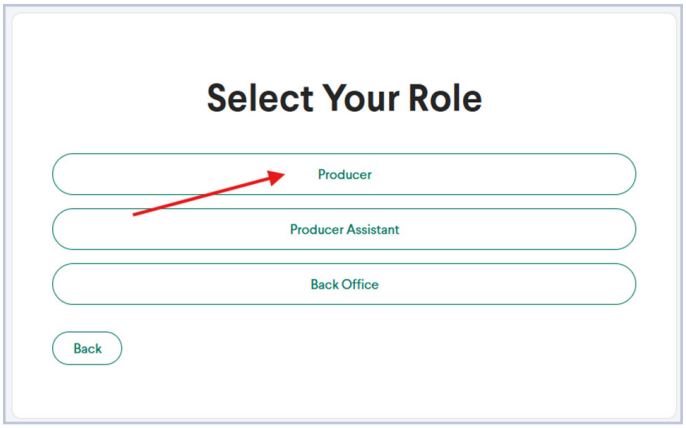
Producer



- To create an account, visit https://portal.delawarelife.io
- Select “Sign Up”



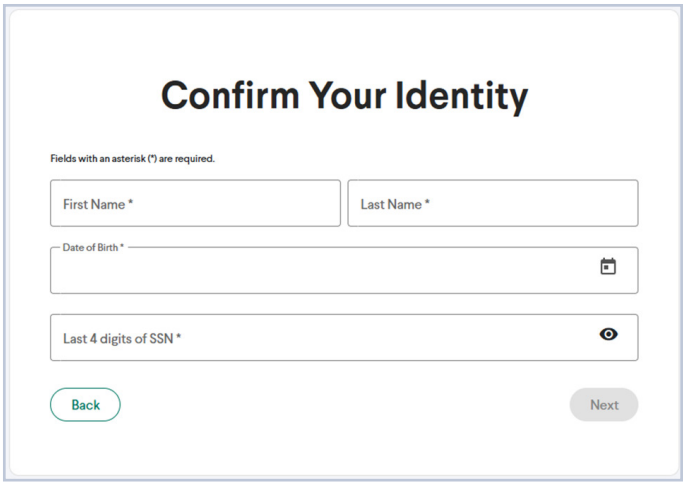
- Select “I’m a Financial Professional”



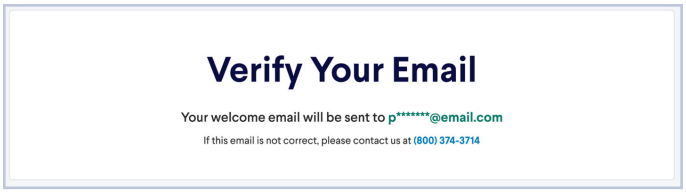
- Select “Producer”

Creating an Account on Delaware Life OnePortal

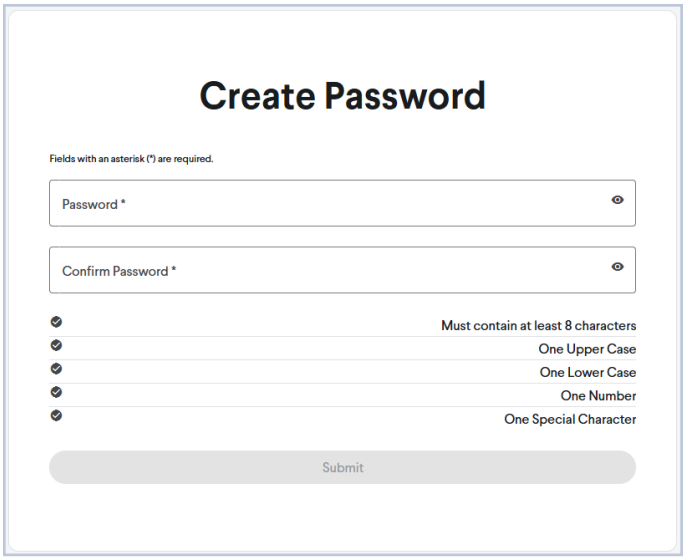
Producer



- Provide the following information (must exactly match your data in our licensing/ appointment system:
  - First Name
  - Last Name
  - Date of Birth
  - Last 4 Digits of SSN



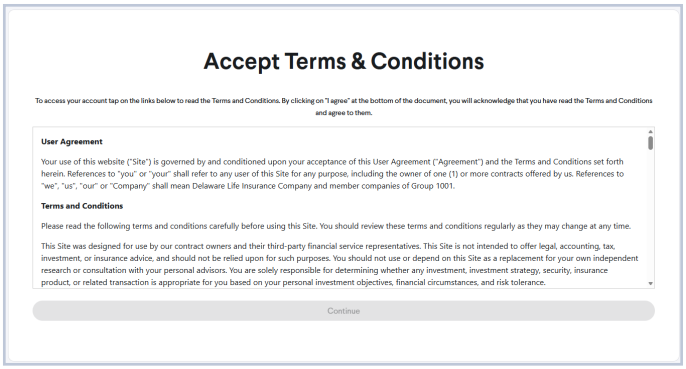
- If you are appointed/contracted with us, and your provided information matches our records, a verification email will be sent to the email address we have on record for you
  - To update your email with us, please contact us at 800-374-3714
  - This is a time sensitive, one-time use email
  - For subsequent logins, please visit https://portal.delawarelife.io

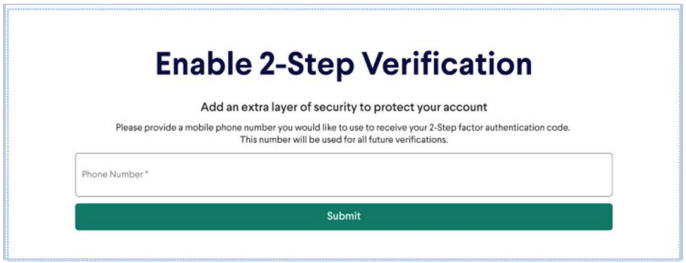


- Select the button in this email to complete account setup:
  - Create a password
  - Accept Terms & Conditions
  - Setup 2-step verification

Creating an Account on Delaware Life OnePortal

Producer

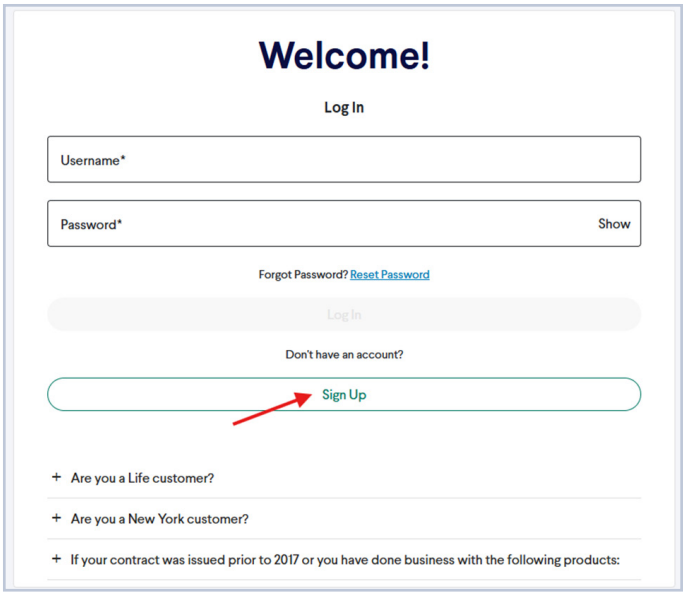




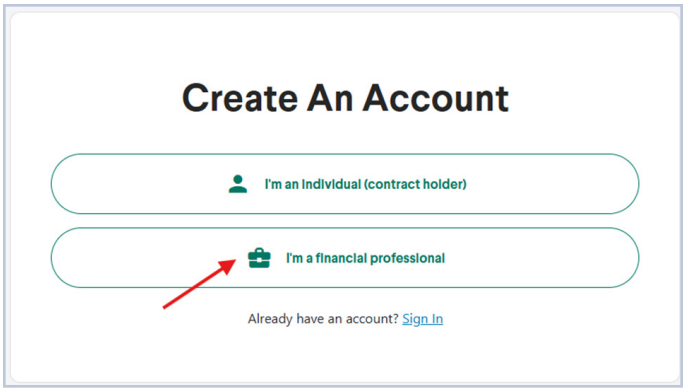
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Creating an Account on Delaware Life OnePortal

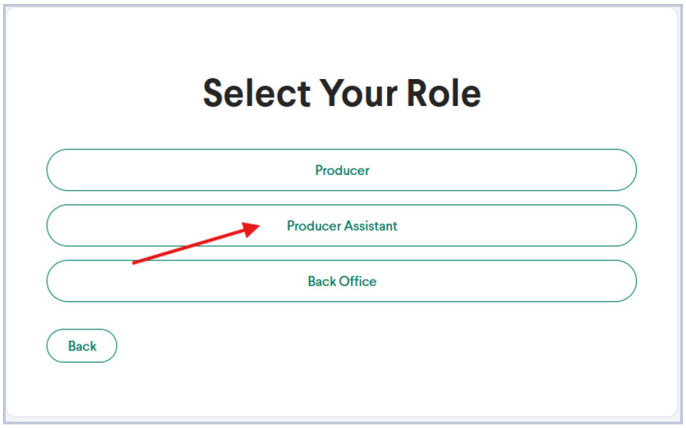
Producer Assistant



- To create an account, visit https://portal.delawarelife.io
- Select “Sign Up”



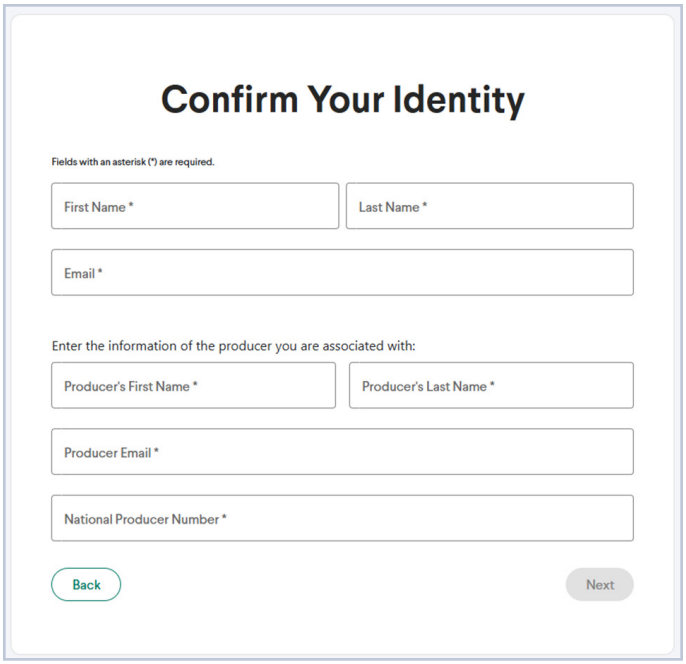
- Select “I’m a Financial Professional”

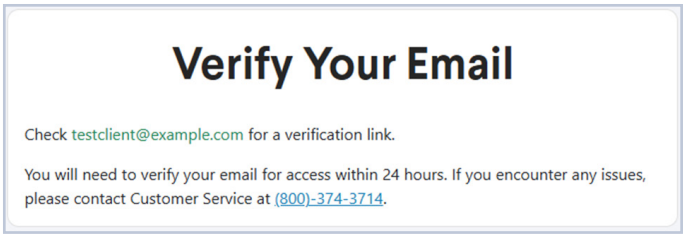


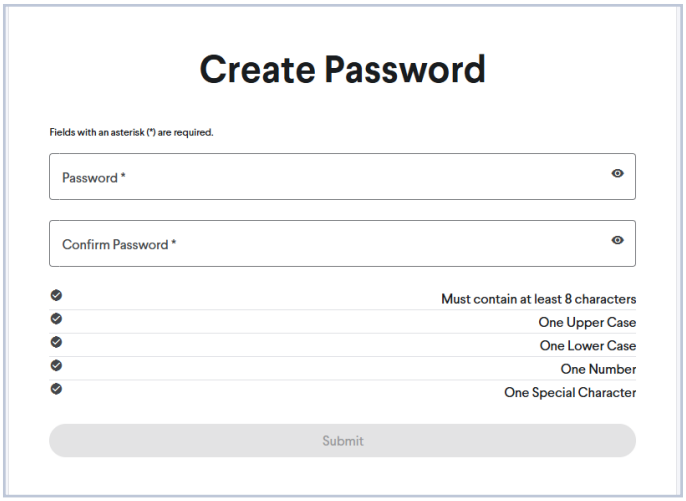
- Select “Producer Assistant”

Creating an Account on Delaware Life OnePortal

Producer Assistant



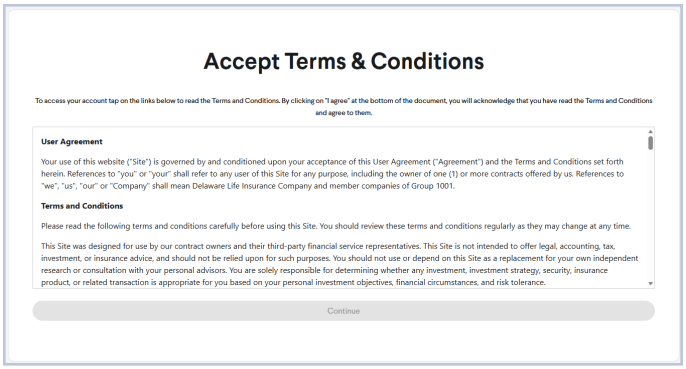


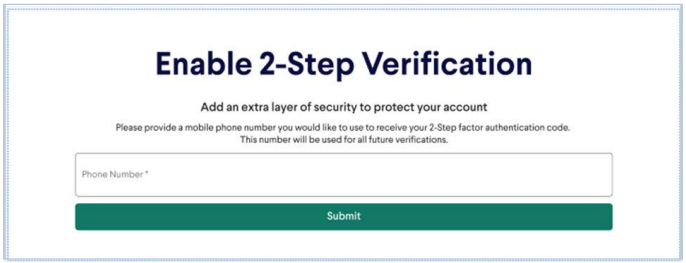


- Provide your information:
  - First Name
  - Last Name
  - Email
- Provide the producer's information:
  - Producer's First Name
  - Producer's Last Name
  - Producer Email
  - Producer's National Producer Number (NPN)
- A verification email will be sent to the email address we have on record for you
  - This is a time sensitive, one-time use email
  - For subsequent logins, please visit https://portal.delawarelife.io
- Select the button in this email to complete account setup:
  - Create a password
  - Accept Terms & Conditions
  - Setup 2-step verification
- Please note
  - The ability of an Assistant to see their Producer's book of business is not instant, they will need to first be verified

Creating an Account on Delaware Life OnePortal

Producer Assistant

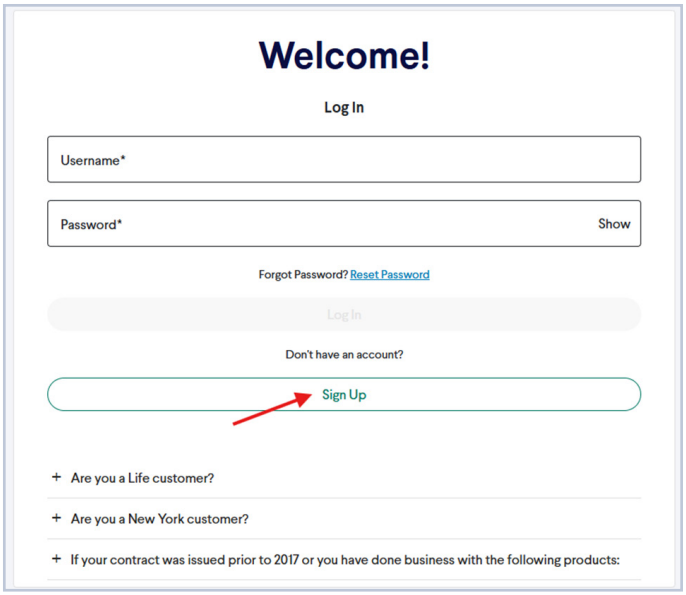




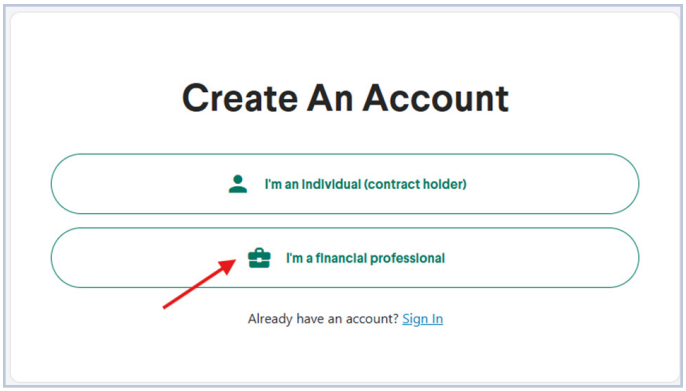
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Creating an Account on Delaware Life OnePortal

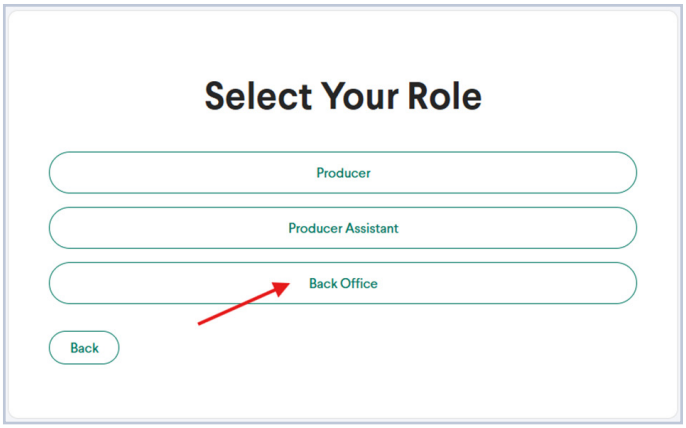
Back Office



- To create an account, visit https://portal.delawarelife.io
- Select “Sign Up”



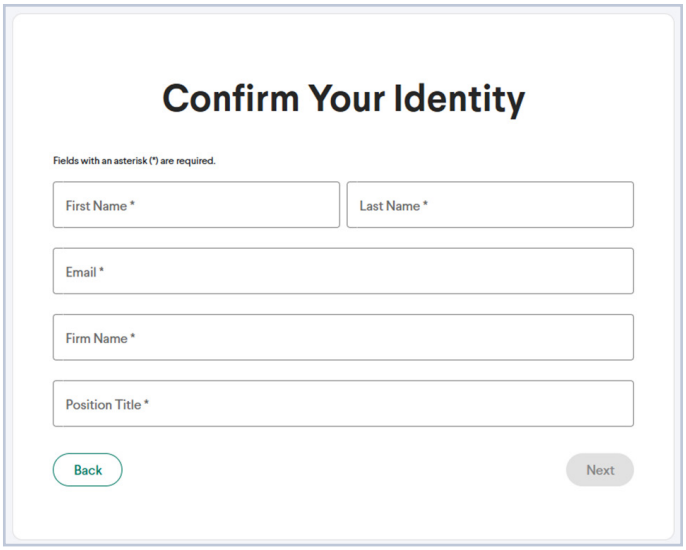
- Select “I’m a Financial Professional”



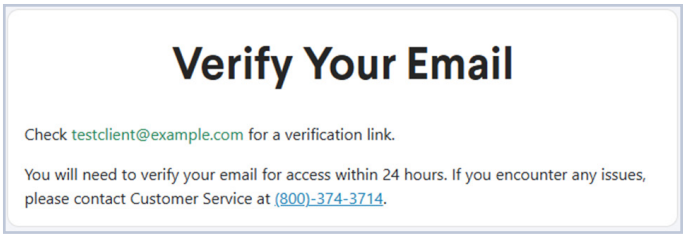
- Select “Back Office”

Creating an Account on Delaware Life OnePortal

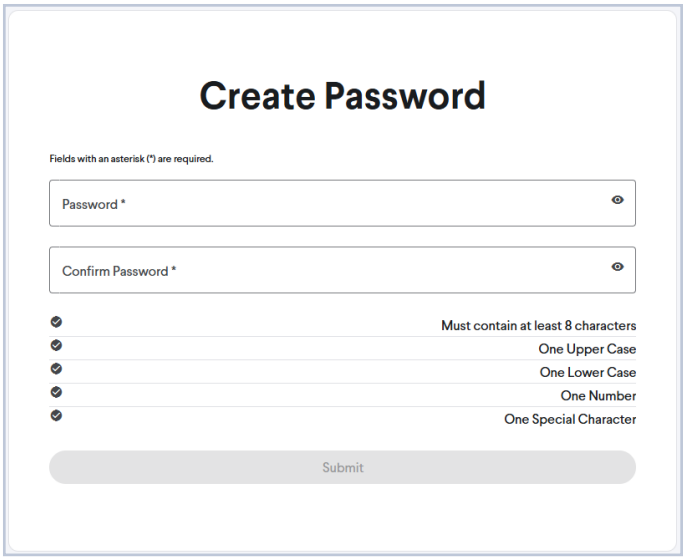
Back Office



- Provide your information:
  - First Name
  - Last Name
  - Email
  - Firm Name
  - Position Title



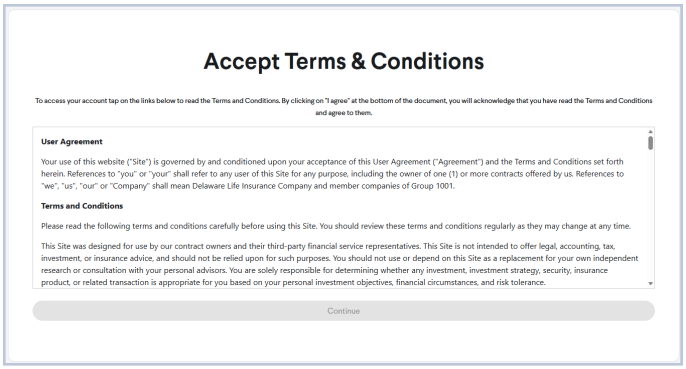
- A verification email will be sent to the email address we have on record for you
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  - For subsequent logins, please visit https://portal.delawarelife.io

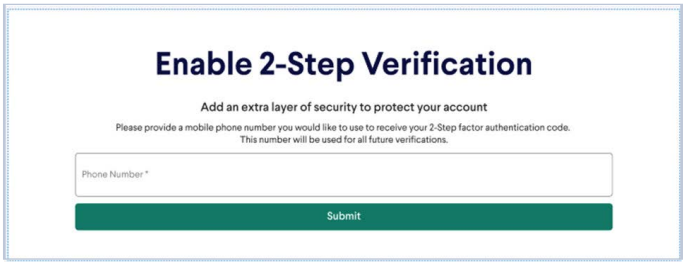


- Select the button in this email to complete account setup:
  - Create a password
  - Accept Terms & Conditions
  - Setup 2-step verification
- Please note
  - Delaware Life will work with your firm to authorize your back office access
  - You will be able to access your firm's Book of Business once authorized

Creating an Account on Delaware Life OnePortal

Back Office



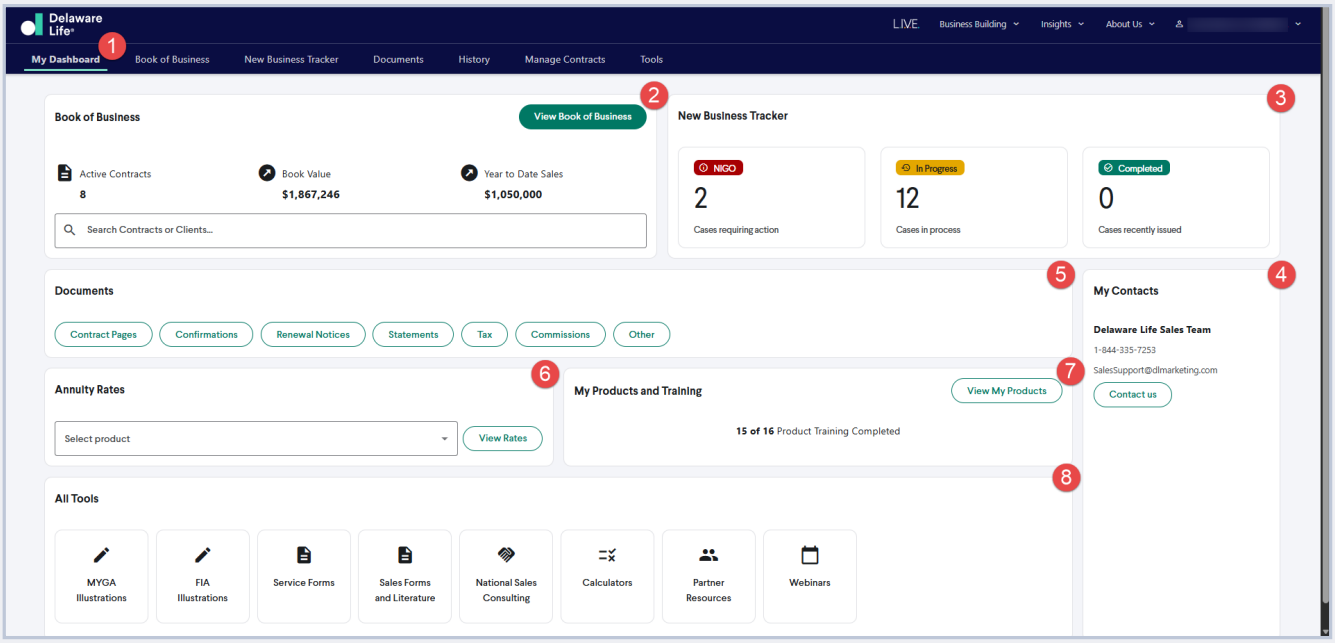


Having trouble? Contact us at 800-374-3714 (Mon to Fri 8:30am to 6:00pm EST)

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Your Dashboard

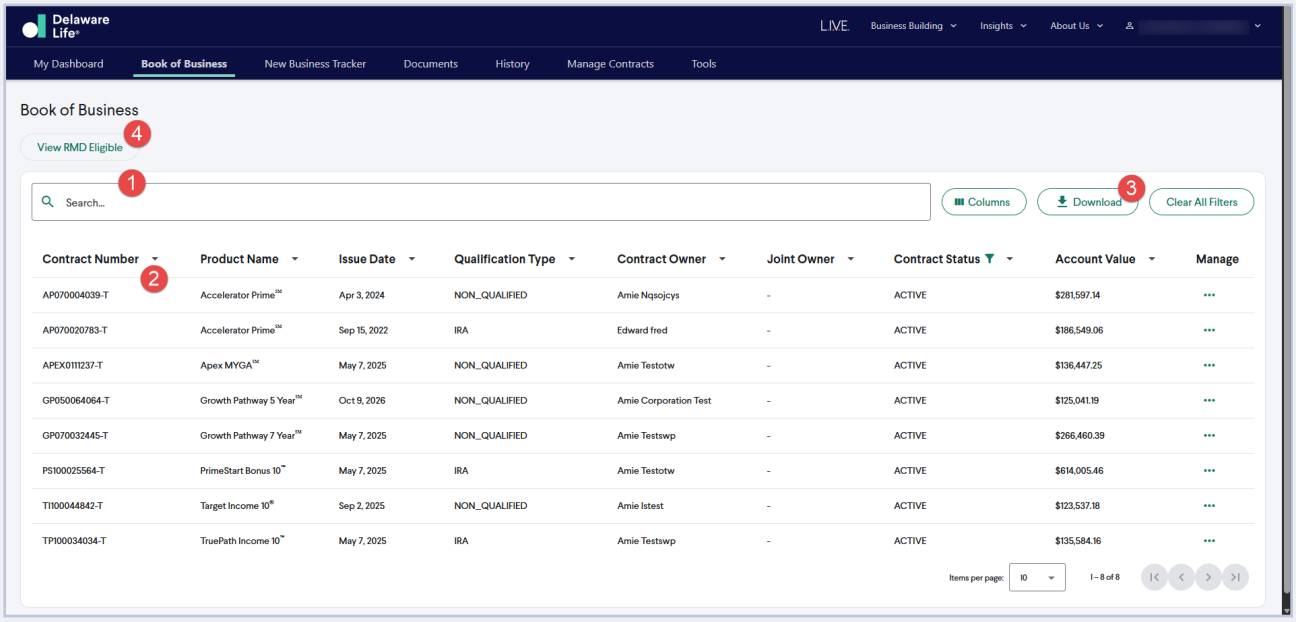


1. Site Navigation: Move quickly between the main sections of the portal.
2. Book of Business: View your complete book of business.
3. New Business Tracker: Track your pending cases. Select a status to see only the cases in that status.
4. My Contacts: Find contact information for your dedicated support team.
5. Documents: Quick access to policy documents.
6. Annuity Rates: Select a product to view and download its current rates.
7. Role-Specific Section: What you see here depends on your role:
   - Producers – My Products & Training: Select View My Products to see the products your firm has approved and which Delaware Life product trainings you've completed.
   - Assistants – My Producers: See the advisors (producers) whose business you can access.
   - Back Office – My Firms: See the firms or IMOs whose business you can access.
8. All Tools: Go straight to illustrations, new business forms, service forms, and other commonly used resources.

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Book of Business



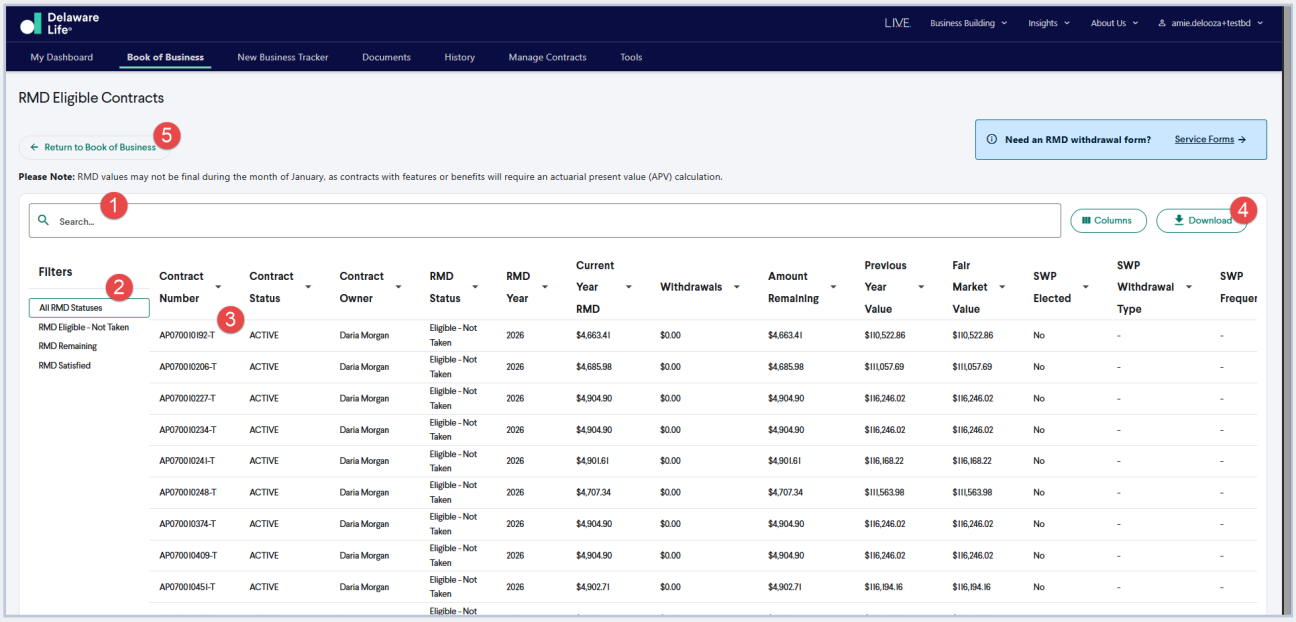
1. Search for your client's contracts by contract number, name, and more
2. A list of your client's contracts – selecting one will open the contract details
3. A button to download your book of business
4. A link to view RMD eligible contracts

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Book of Business

RMD Eligible



1. Search for client's RMD eligible contracts by contract number, name, and more
2. Filter the list of RMD eligible contracts by those with RMD taken, RMD remaining, RMD satisfied, or all statuses
3. A list of your client's RMD eligible contracts with pertinent RMD information, including current year RMD, amount withdrawn, amount remaining, and more – selecting one will open the contract details
4. A button to download the entire list of RMD eligible contracts
5. A link to return to your entire Book of Business page

Navigating Delaware Life OnePortal

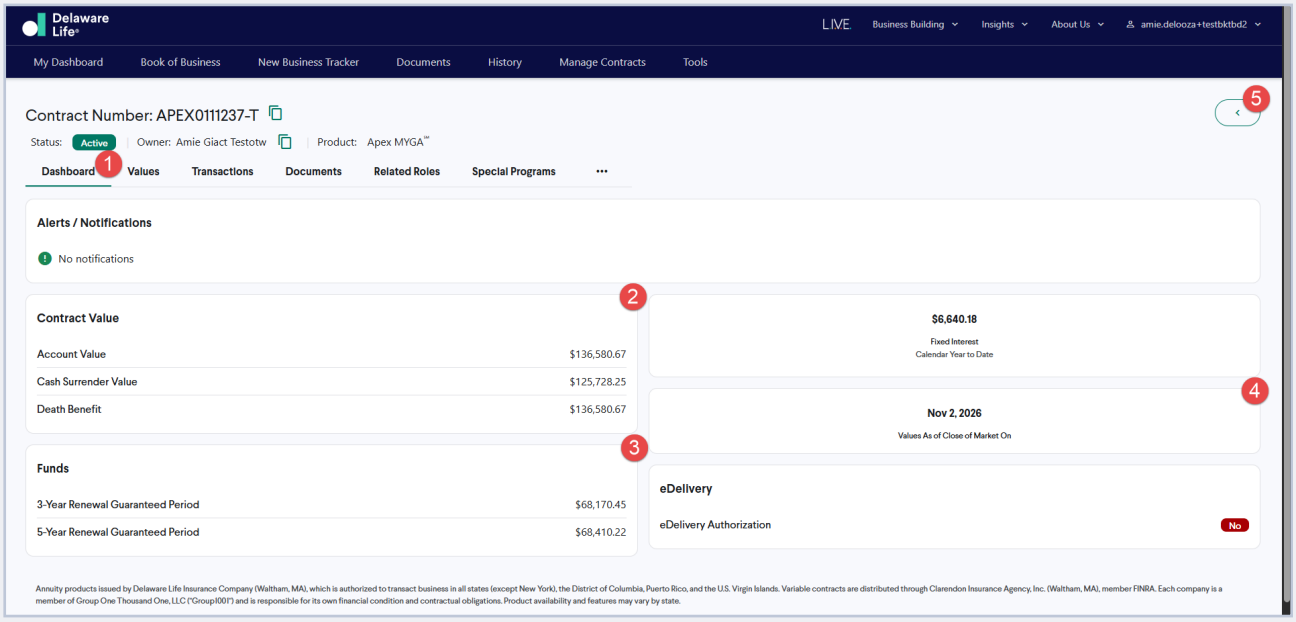
Producers, Producer Assistants, and Back Office Users

Contract Details

Dashboard

Once a contract is selected, it will bring you to a Contract Dashboard where you will see contract summary information. Selecting a different tab will provide more information.

Please note: Annuity product values, provisions, and details vary. The example provided in this user guide is only intended to provide a general overview of contract detail navigation in OnePortal.



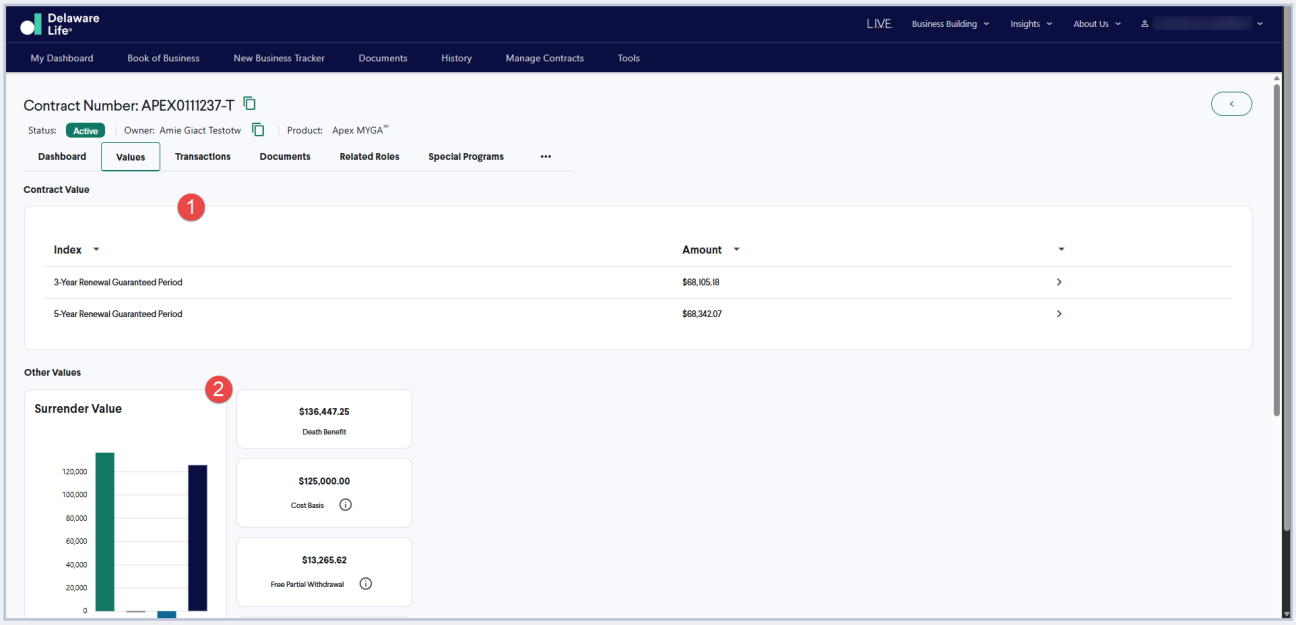
1. The current contract tab you are on
2. Contract values summary
3. Contract investment summary
4. “As Of” Values Date
5. Expandable sidebar with more contract summary information

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Contract Details

Values



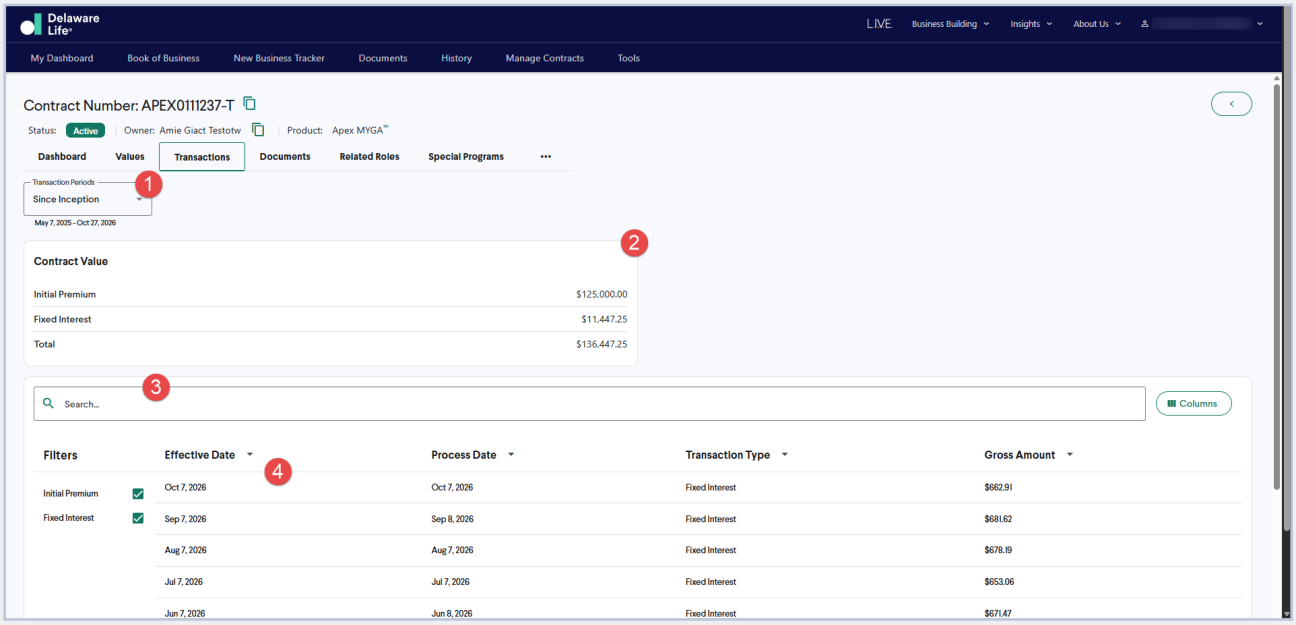
1. A detailed list of investments. Selecting one will display more information specific to that investment, such as term length, rate, and more
2. Other pertinent contract values, including benefit values (living and death), free amounts, and more - select a tooltip to learn more about specific values

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Contract Details

Transactions



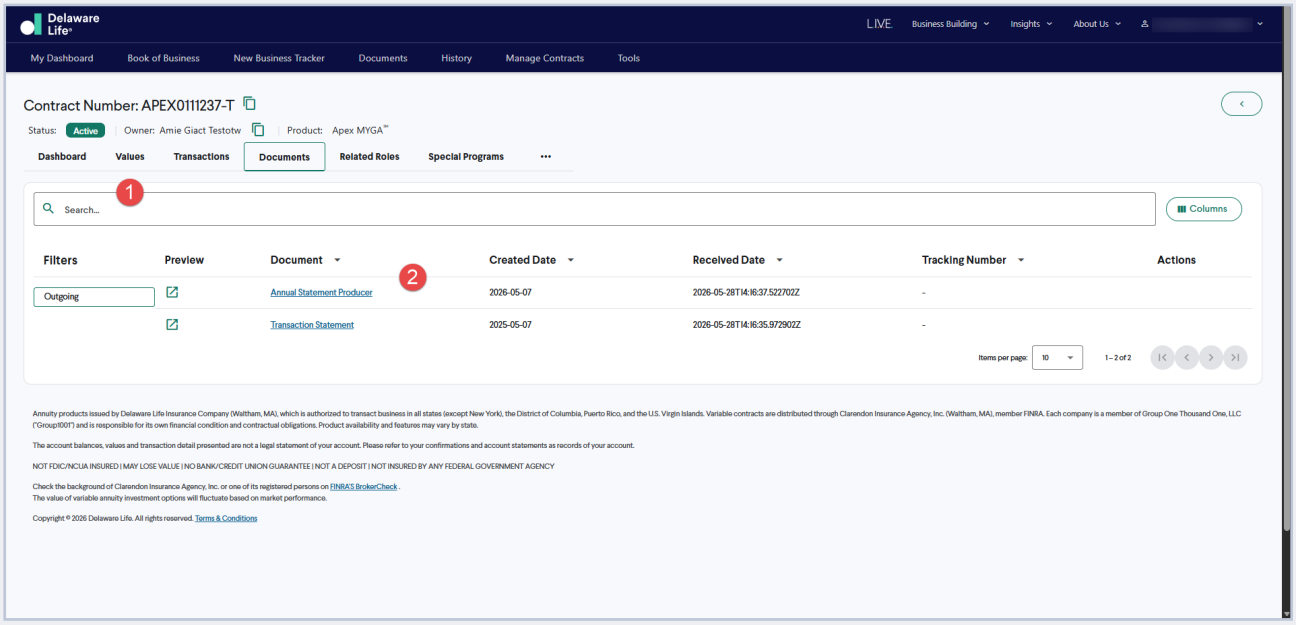
1. Select a transaction period update/modify the transaction overview/summary pane
2. The transaction overview/summary pane, summarizing the transaction activity for the period specified
3. Search for specific transactions by type or amount
4. Select a transaction to view more information about it

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Contract Details

Documents



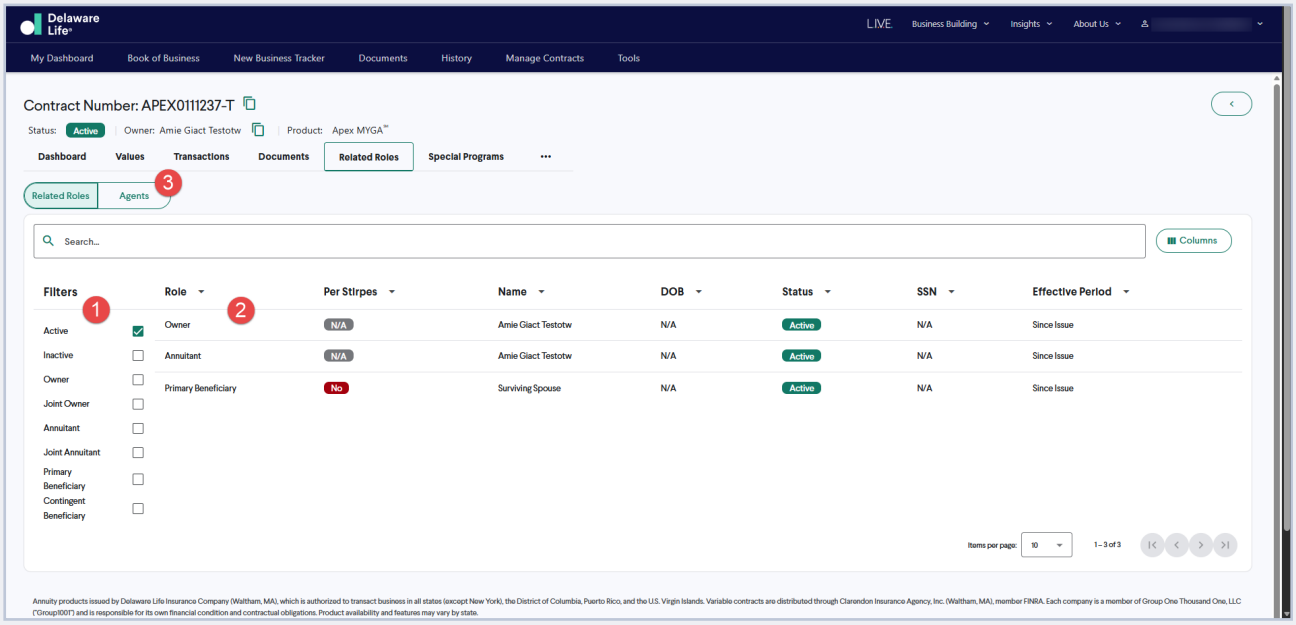
1. For this contract, search for documents by document name
2. Select a document to view and/or download

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Contract Details

Related Roles

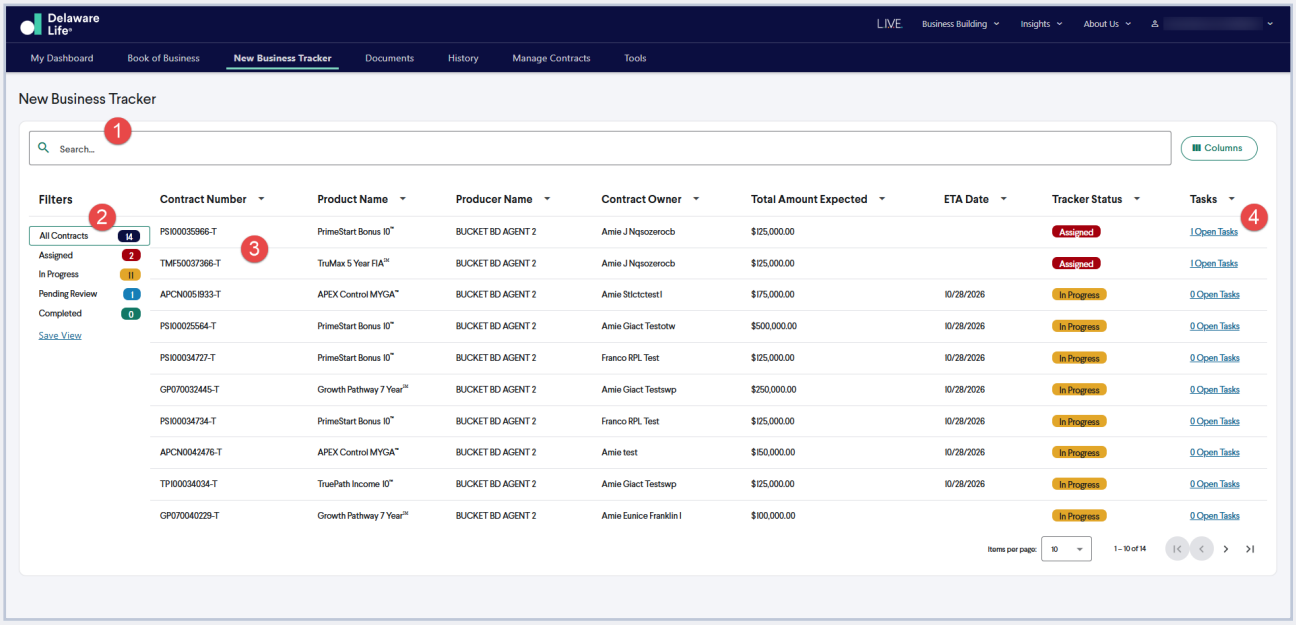


1. Filter contract roles by status
2. View contract roles, such as owners, beneficiaries, and more - select a role to view more information, such as limited contact information, role percentages, and more
3. Select the agent tab to view servicing agent details

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

New Business Tracker



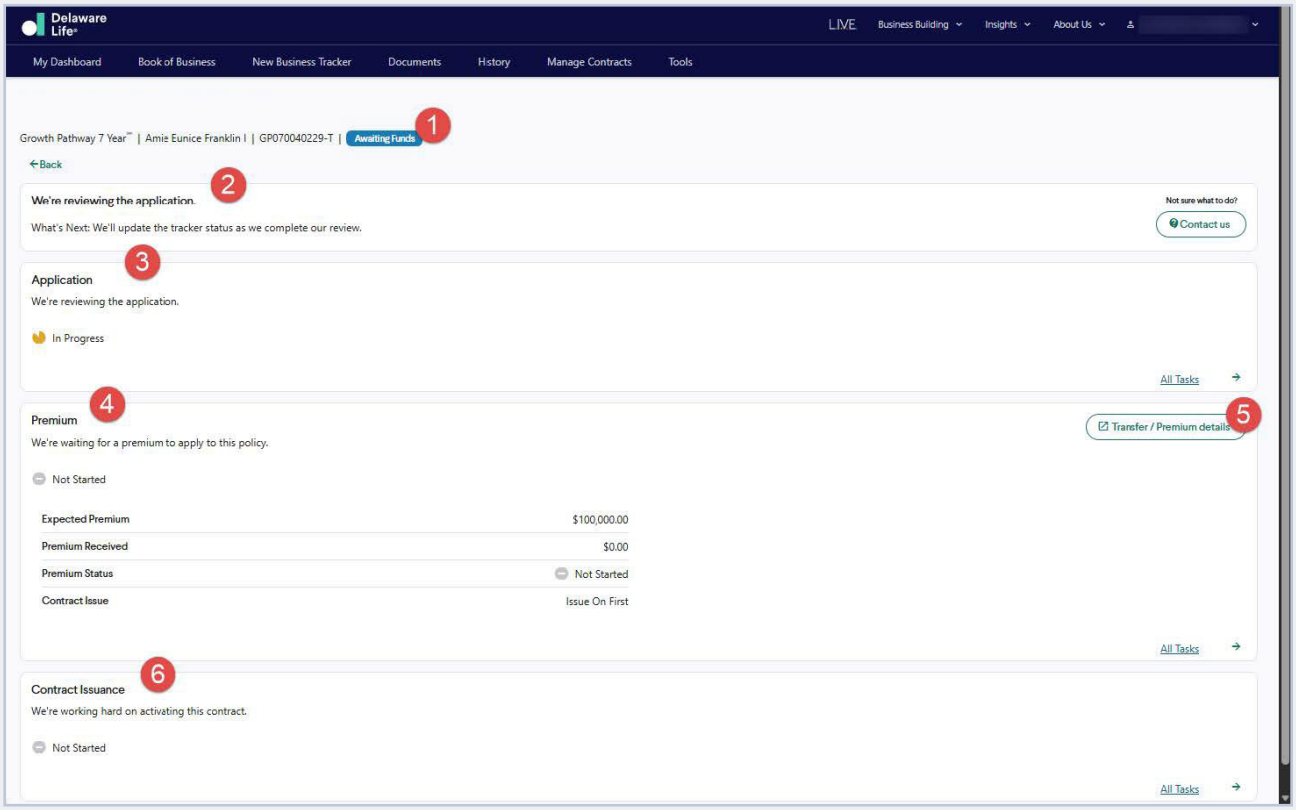
1. Search for pending new business or recently issued business by contract number or owner name
2. Filter your new business cases by status:
   a. All statuses
   b. Assigned – Not In Good Order (NIGO) cases requiring action
   c. In Progress – Cases being processed or awaiting funds
   d. Pending Review – Cases with tasks (NIGOs) that were resolved on OnePortal and are routing back to our processing teams
   e. Completed – Contracts that have recently issued
3. A list of new business cases. Selecting one will open the case's details
4. If a case is NIGO, selecting the tasks link will take you directly to the open NIGO tasks that need resolution

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

New Business Tracker

Case Overview



1. The status of the contract
2. A summary of the current stage of the new business case review
3. Overview of the application's review status - if NIGOs are present, they will appear here
4. A summary of funding premium information
5. Selecting Transfer/Premium Details will open a more detailed view of individual funding sources, including transfer form received and sent dates, premium received dates and amounts, and more
6. When a contract has issued, the contract issuance pane will provide additional details about the issuing date and contract

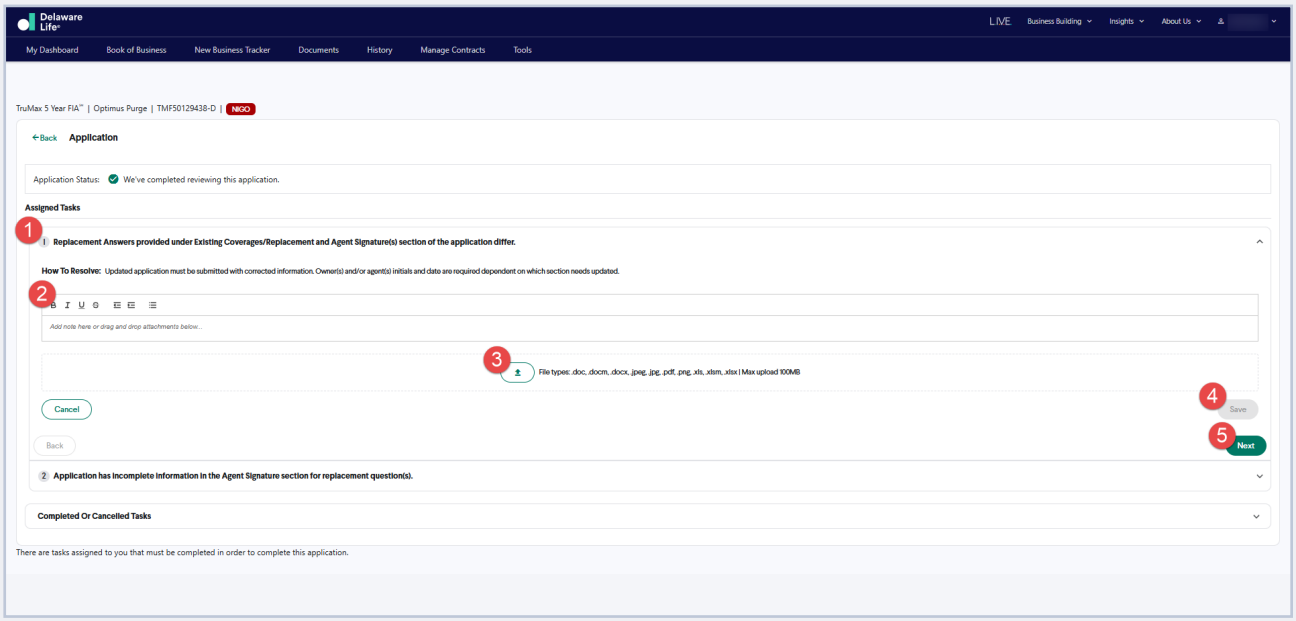
Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

New Business Tracker

NIGO Details & Resolution

Selecting an assigned NIGO task will take you to the NIGO task management page

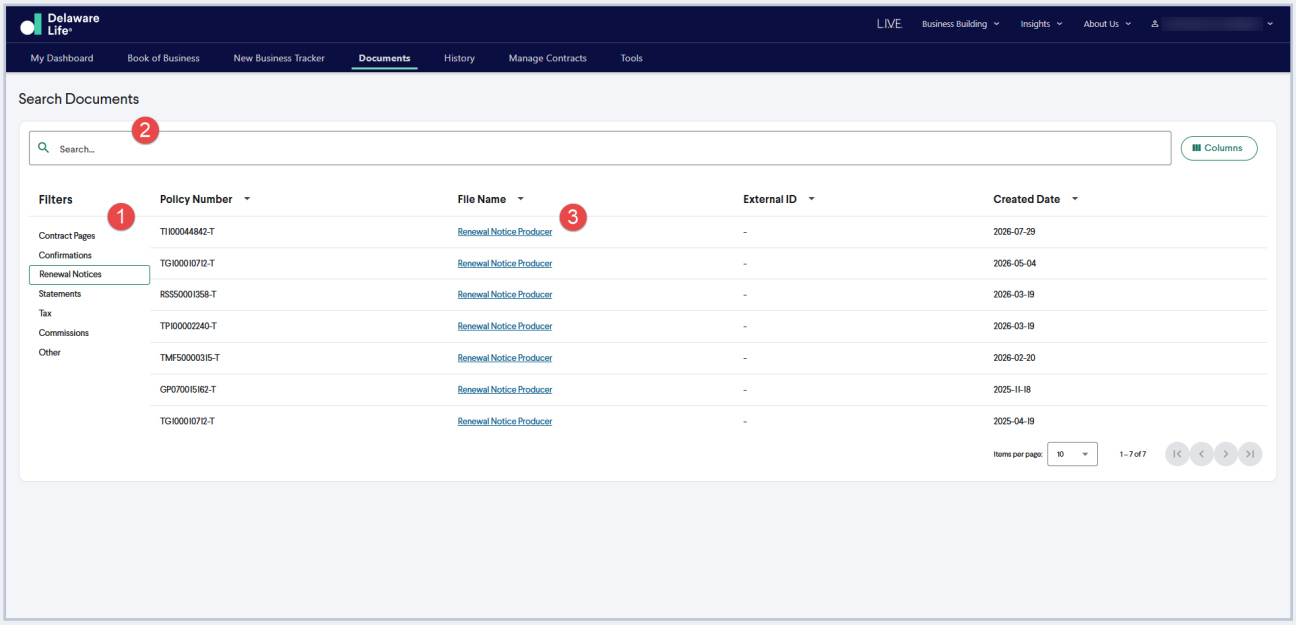


1. By default, the first NIGO tasks will be expanded displaying what's wrong, and how to fix it
2. If a NIGO can be resolved with a clarification, or if you'd like to support a corrected document with additional commentary, notes can be added
3. Corrected and/or supporting documents can be uploaded to the NIGO task
4. Clicking Save after adding comments and/or uploading a document will send the tasks back to our processing team to review
5. Selecting next will expand the next open NIGO task

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Search Documents



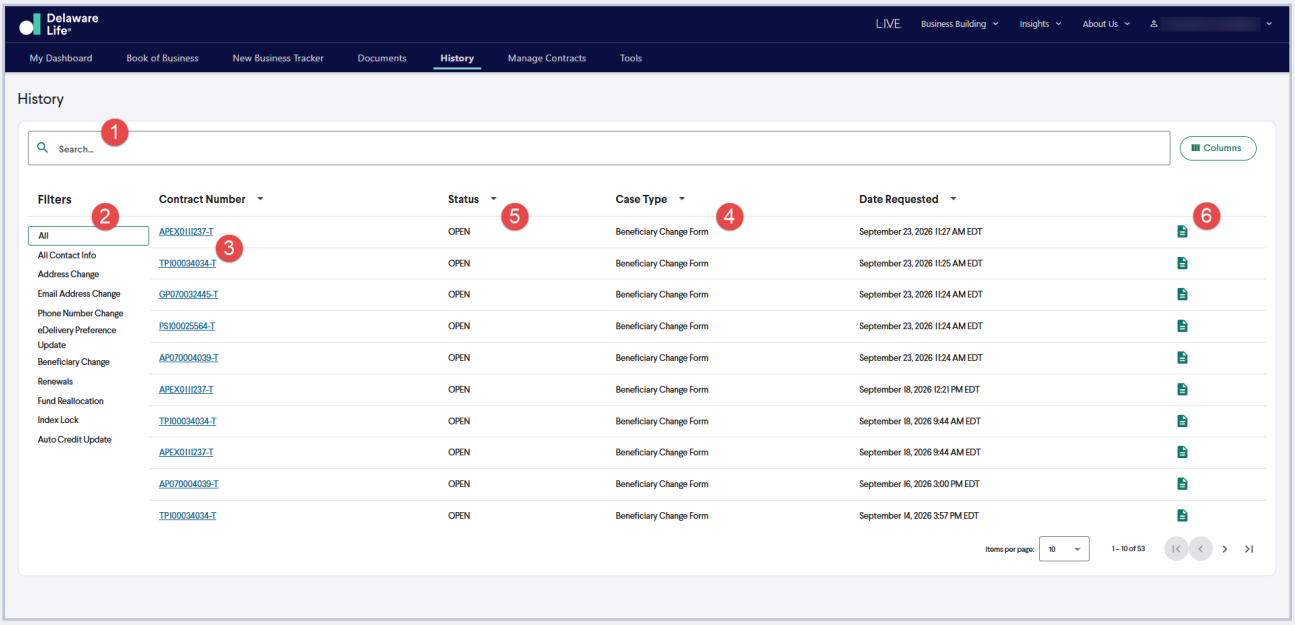
1. To get started, select a document type/category
2. Search through the selected document type across your book of business by contract number, file name, or Delaware Life assigned Agent ID (External ID)
3. Select a document to view and/or download

Please Note: Only the most recent 18 months of documents will appear here

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

History



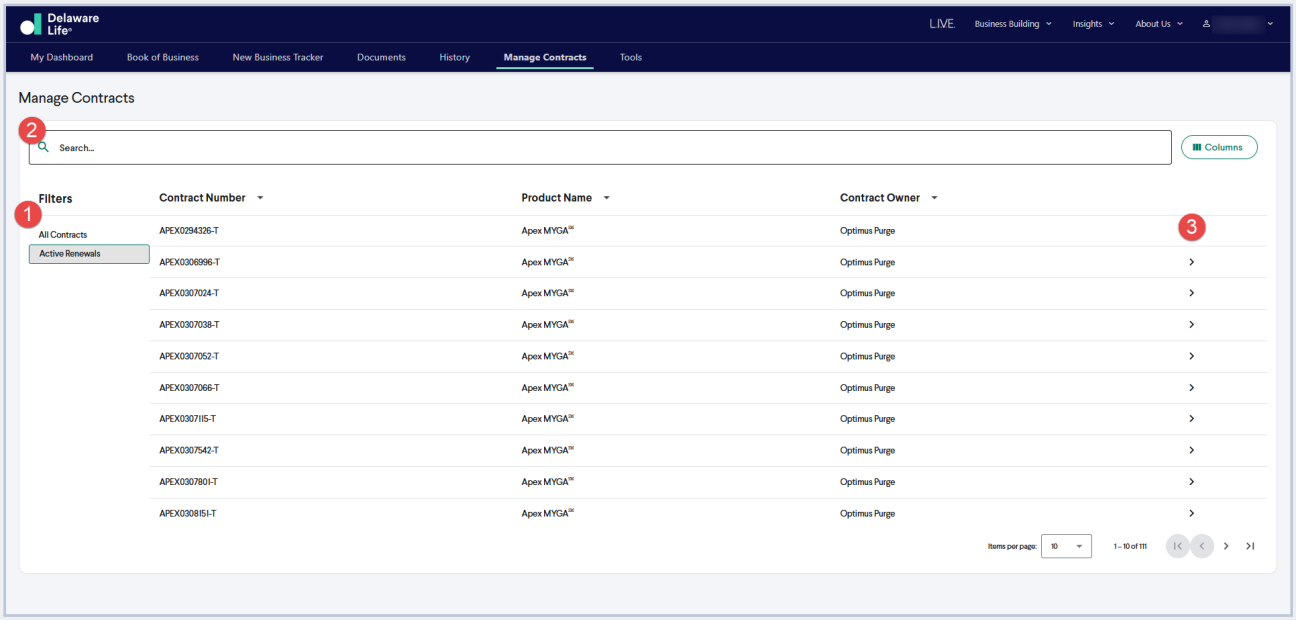
1. Search across select in-force contract transactions performed by your clients or your office
2. Filter by available transaction types
3. Selecting a contract number will open the contract details
4. The type of transaction requested
5. The status of the transaction:
   a. Open – in progress
   b. Completed – processed
   c. Cancelled
6. Details can be viewed for select transaction types (e.g. renewals)

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

Manage Contracts

Perform investment changes for select contracts

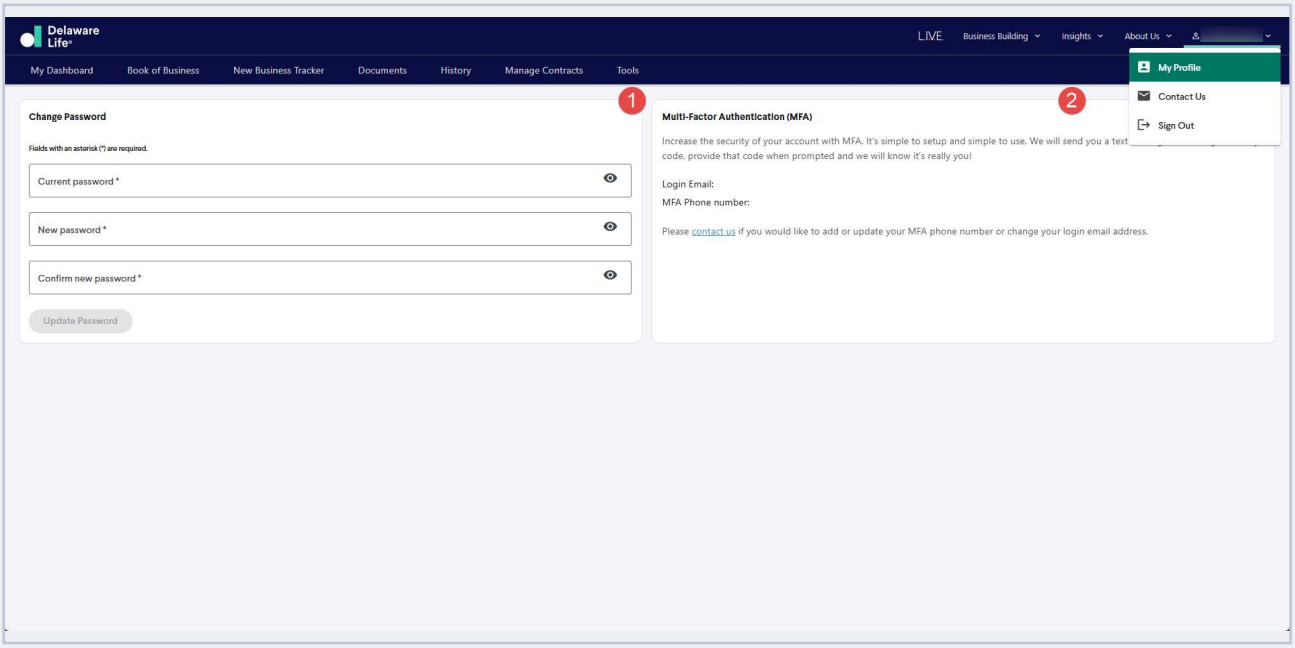


1. Select “All Contracts” to view all investment allocation self-service contracts, including renewals, account reallocations, and fund trades, or select “Active Renewals” to display all fixed contracts currently eligible for renewal or investment reallocation (assuming the producer is authorized by the client)
2. Search for contracts by contract number or client name
3. Select a contract to view investment change eligibi8lity - fixed contracts can be renewed during their renewal window, while variable contract fund trades are available anytime, subject to trading restrictions

Navigating Delaware Life OnePortal

Producers, Producer Assistants, and Back Office Users

My Profile

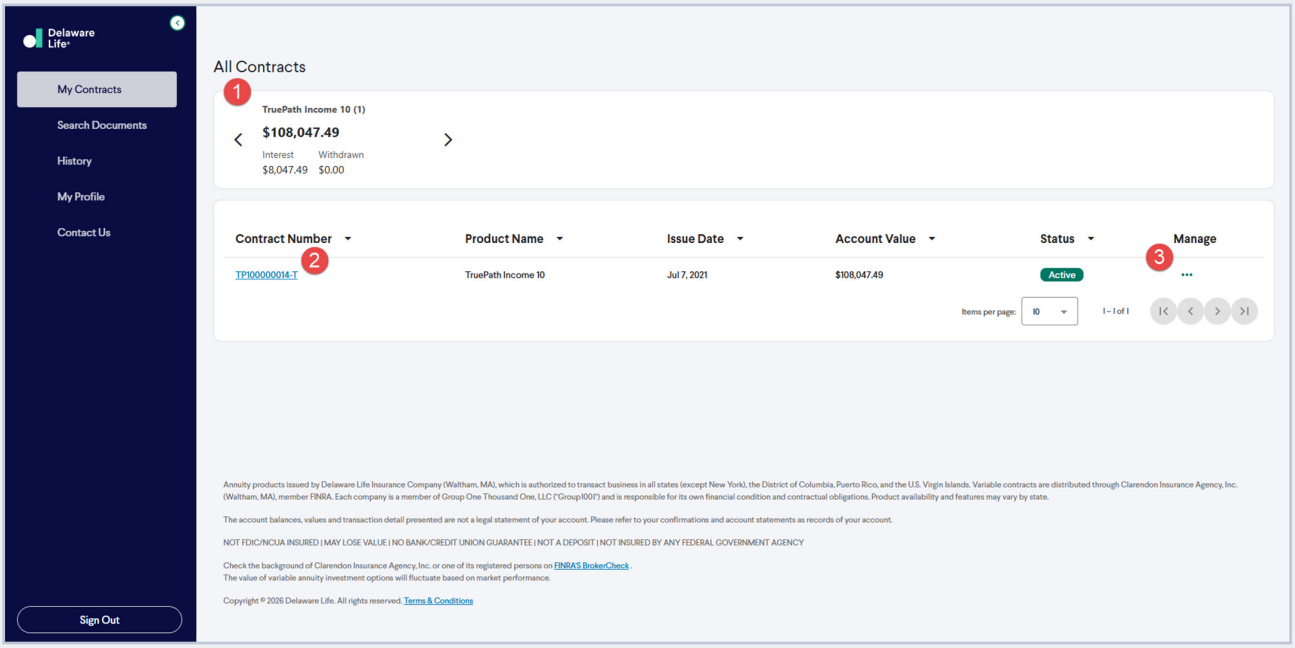


1. Enter your current and new passwords to update/change your login password
2. View your user account details - for security reasons, please contact us if you'd like to update your login email address

Navigating Delaware Life OnePortal

Individuals (Contract Holders)

My Contracts



1. A summary of your contracts. Select the arrows to view more summaries, if applicable
2. A list of your contracts. Selecting a contract will open contract details
3. For certain contracts, selecting the Manage menu (...) will open several self-service options per contract, such as updating personal information or beneficiaries on record

Navigating Delaware Life OnePortal

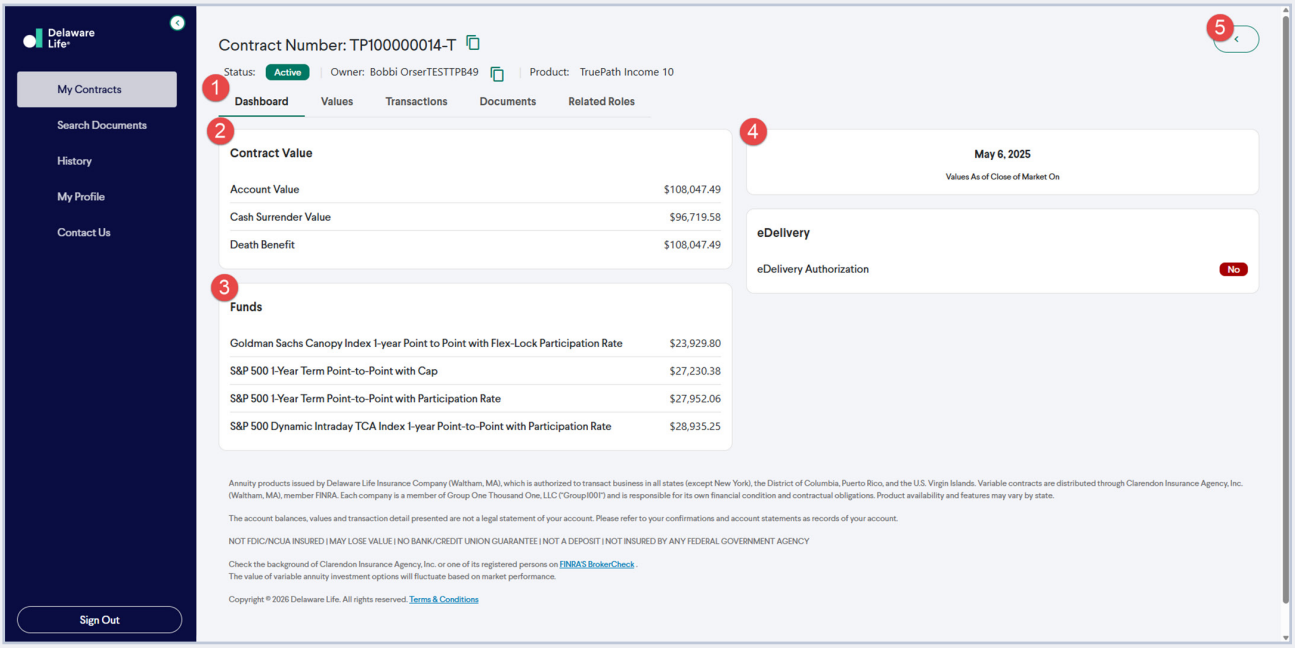
Individuals (Contract Holders)

Contract Details

Dashboard

Once a contract is selected, it will bring you to a Contract Dashboard where you will see contract summary information. Selecting a different tab will provide more information.

Please note: Annuity product values, provisions, and details vary. The example provided in this user guide is only intended to provide a general overview of contract detail navigation in OnePortal.



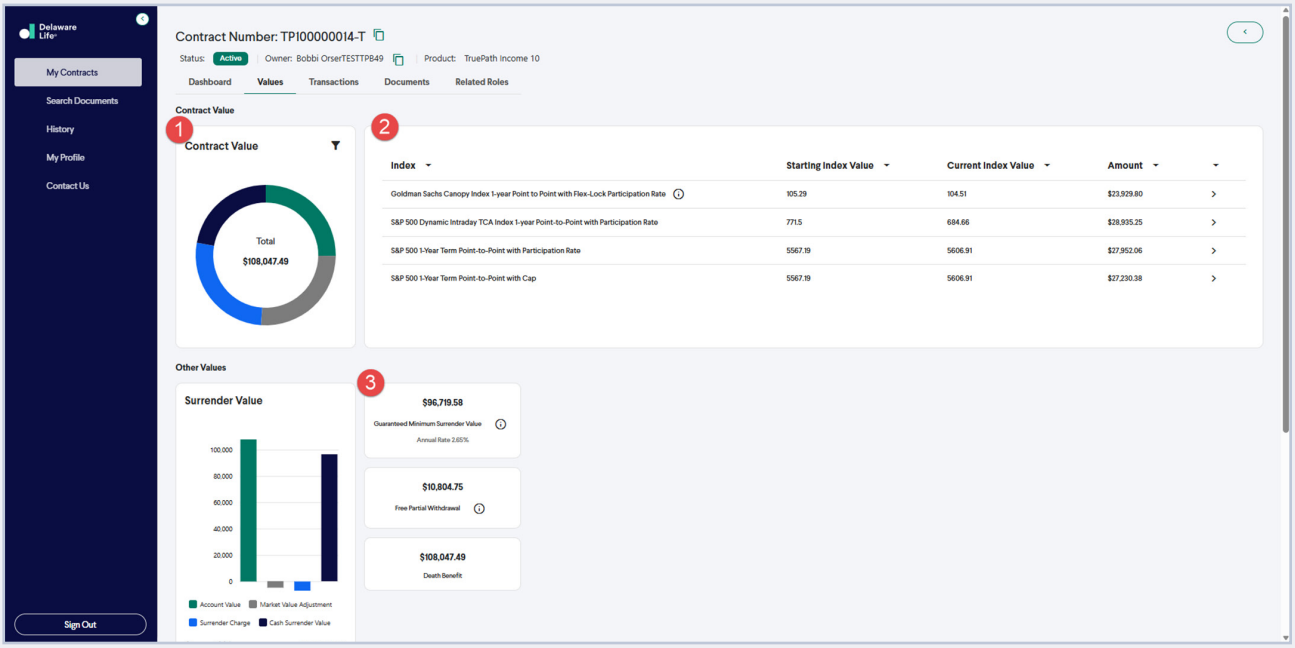
1. The current contract tab you are on
2. Contract values summary
3. Contract investment summary
4. “As Of” Values Date
5. Expandable sidebar with more contract summary information

Navigating Delaware Life OnePortal

Individuals (Contract Holders)

Contract Details

Values



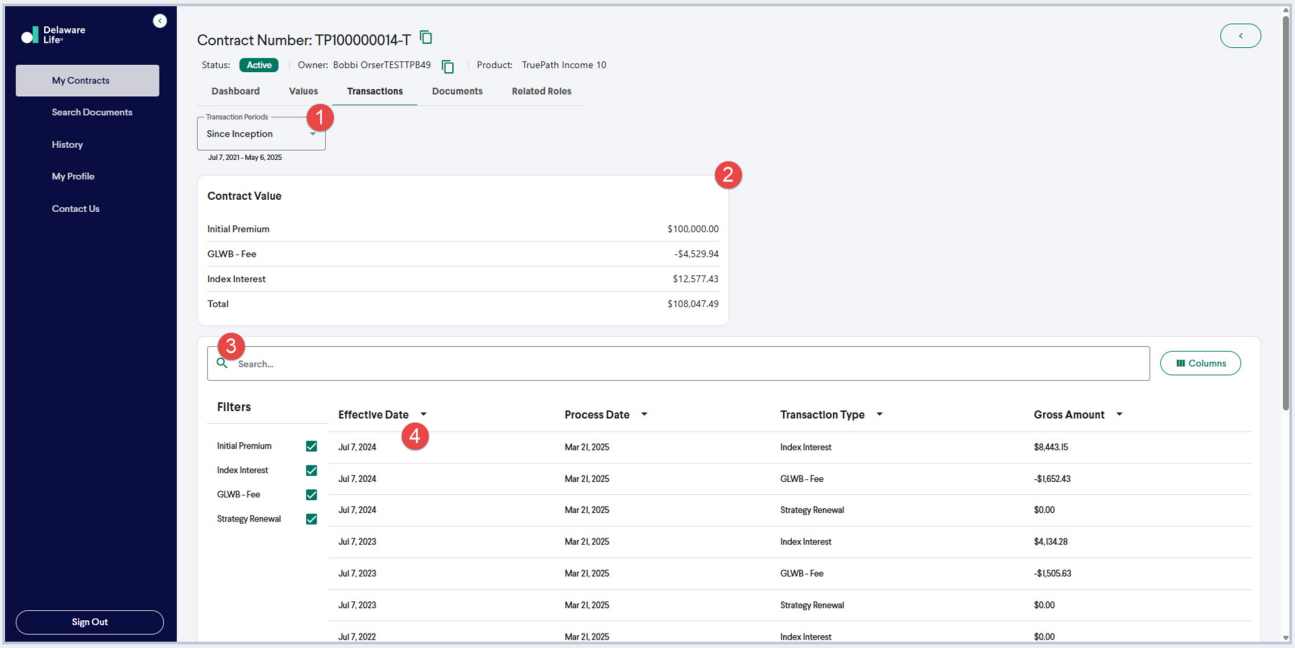
1. A summary chart of your contract value
2. A detailed list of investments. Selecting one will display more information specific to that investment
3. Other pertinent contract values. Select a tooltip to learn more about specific values

Navigating Delaware Life OnePortal

Individuals (Contract Holders)

Contract Details

Transactions



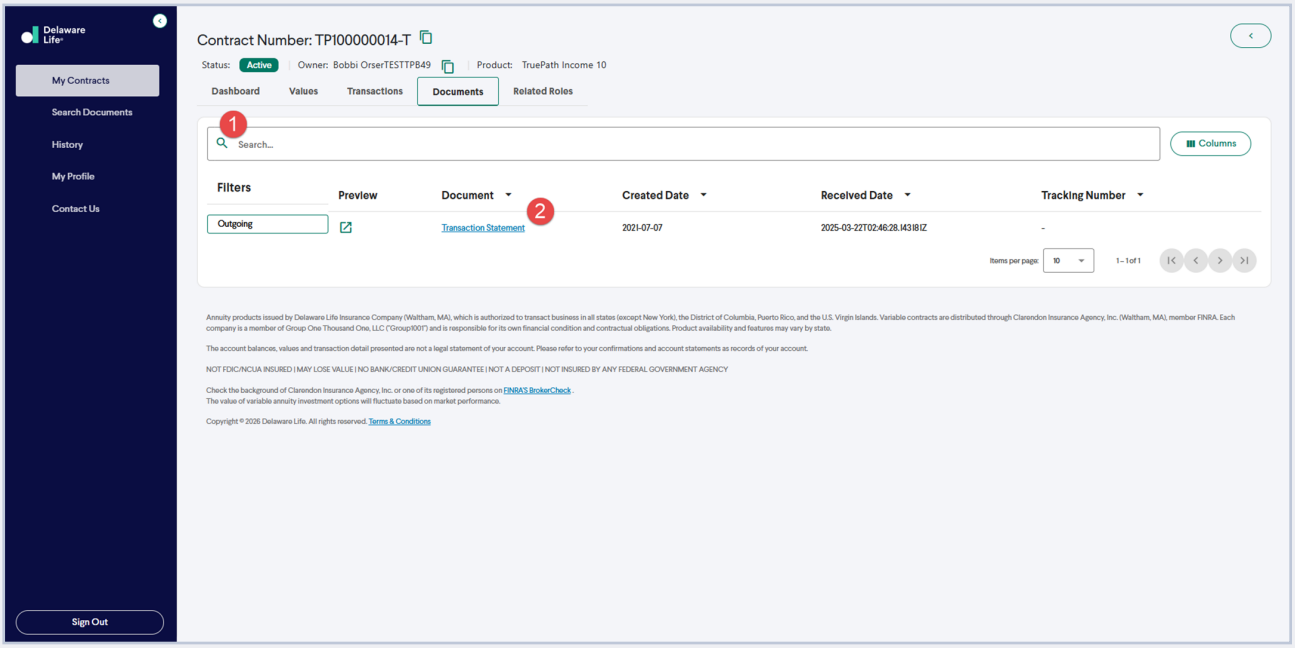
1. Select a transaction period update/modify the transaction overview/summary pane
2. The transaction overview/summary pane, summarizing the transaction activity for the period specified
3. Search for specific transactions by type or amount
4. Select a transaction to view more information about it

Navigating Delaware Life OnePortal

Individuals (Contract Holders)

Contract Details

Documents



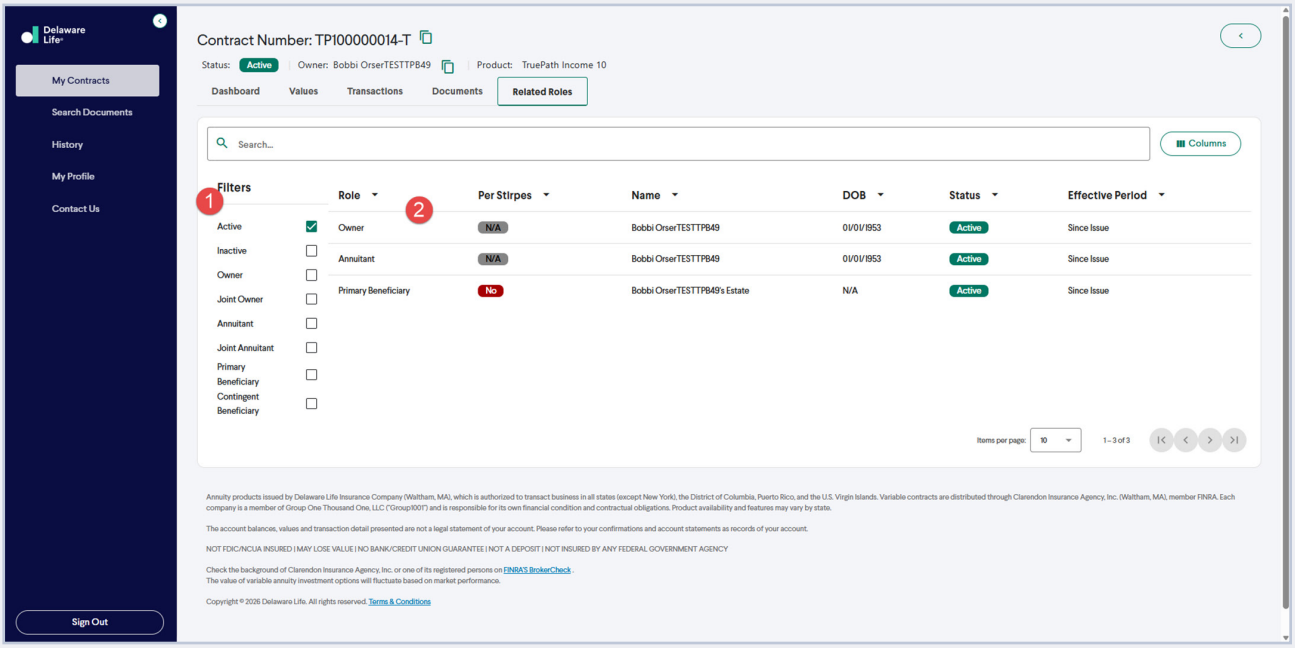
1. Search for this contract's documents by document name
2. Select a document to view and/or download

Navigating Delaware Life OnePortal

Individuals (Contract Holders)

Contract Details

Related Roles

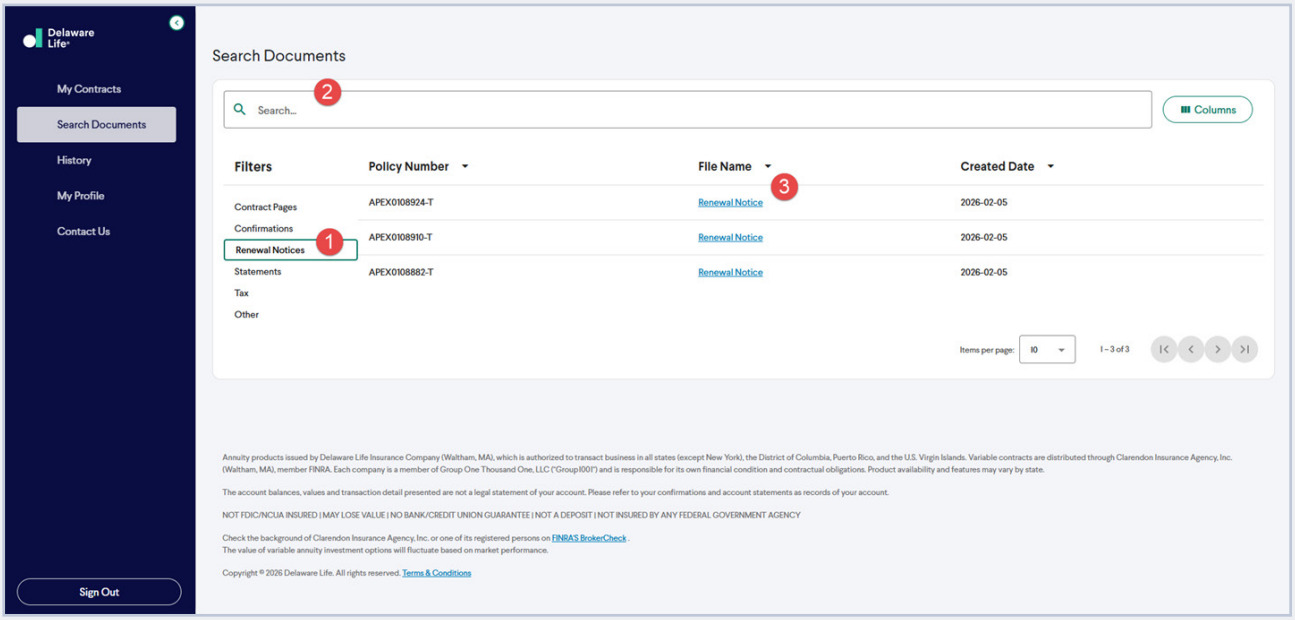


1. Filter contract roles by status
2. View contract roles, such as owners, beneficiaries, and more - select a role to view more information, such as limited contact information, role percentages, and more

Navigating Delaware Life OnePortal

Individuals (Contract Holders)

Search Documents



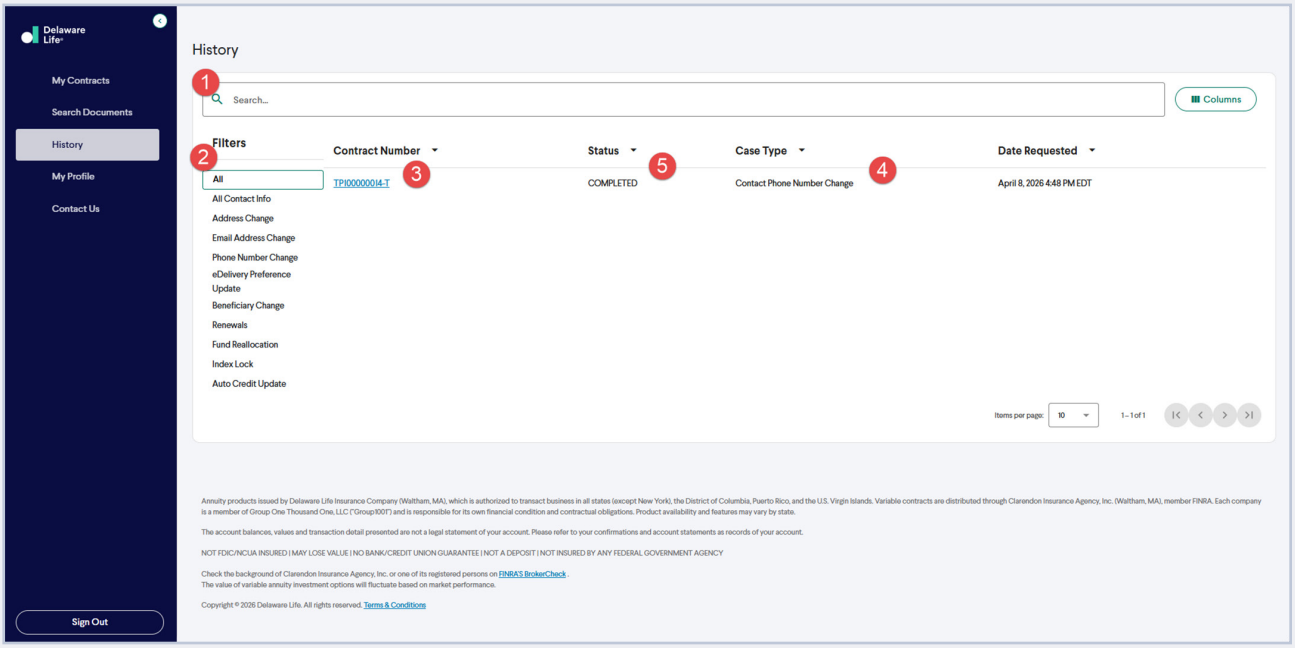
1. To get started, select a document type/category
2. Search through the selected document type across your contracts by contract number or file name
3. Select a document to view and/or download

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Navigating Delaware Life OnePortal

Individuals (Contract Holders)

History

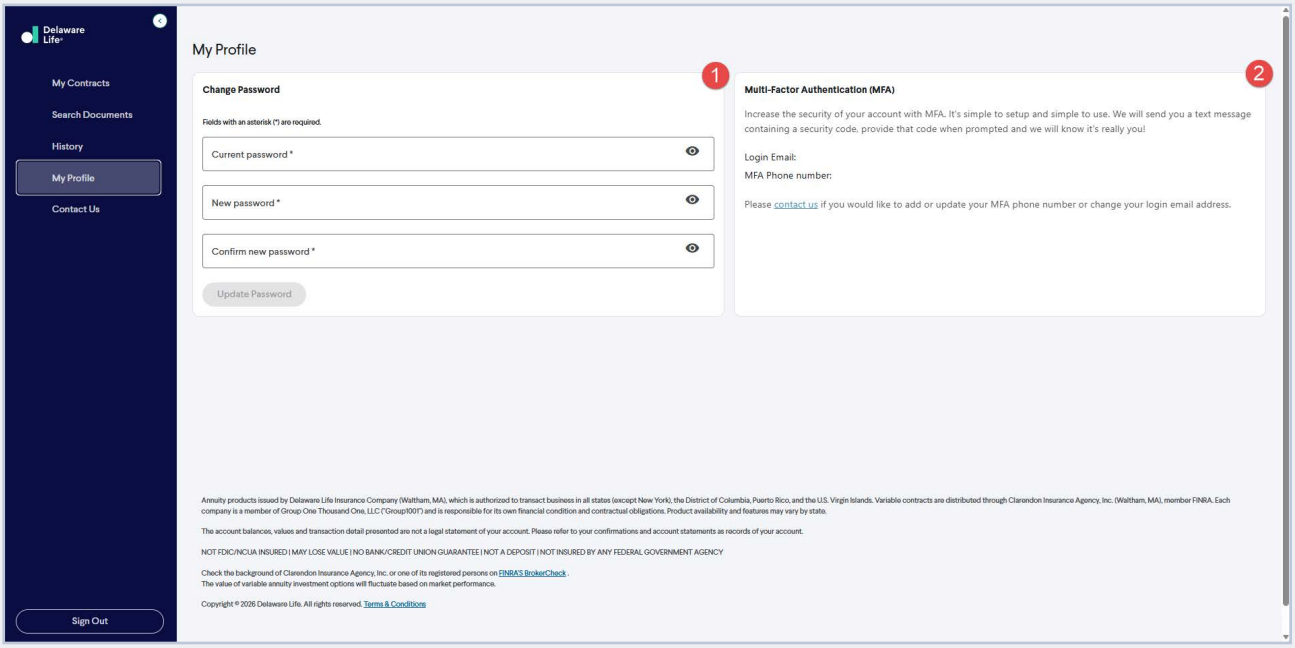


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5. The status of the transaction:
   a. Open – in progress
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Navigating Delaware Life OnePortal

Individuals (Contract Holders)

My Profile



1. Enter your current and new passwords to update/change your login password
2. View your user account details - for security reasons, please contact us if you'd like to update your login email address

Delaware Life®

Having trouble? Contact us.

Email: PortalAccess@delawarelife.com

Phone: 800-374-3714 (Monday through Friday 8:30 am to 6:00 pm EST)

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