

# C.I. E-App Submission Guide

**MYCBL Portal Login** - First, go to [www.cbllife.com](http://www.cbllife.com) and select the 'Producers' Tab. From there, click the link to proceed to the **MYCBL** Login page.

*The **MYCBL** Agent portal is where **ALL** CBS business is conducted!*

(Preferred Browsers: Firefox, Chrome, I.E. – Safari & Microsoft Edge are **NOT** Compatible)

Agents are assigned a writing number when they become appointed. That writing number becomes their **MYCBL** username, and it is sent to them in a Welcome E-mail that includes a default password 'cbl0315'.

(Default Pass is Case Sensitive – All Lowercase **CBL0315 C-B L-Zero-Three-One-Five**)

Upon successful login agents can create a new password under the 'My Profile' tab.

For **TRS C.I.** business agents will utilize the following links:

**Timber Ridge E-Applications** – This is for TRS C.I. Quotes and New E-Applications.

**E-Application Maintenance** – This displays applications that were previously started, submitted, and those that still need to be completed.

(Please Note: The E-Application Maintenance dashboard is only for completing requirements on new enrollments started from the Timber Ridge E-Applications link or checking previously submitted apps and will **NOT** display any active policy status or commission information as that information is available under the 'Reports' tab on **MYCBL**.)

For **G.I.C.I.** business agents will utilize the following link:

**LifeStyle Assurance (G.I.C.I.) E-Applications** – This will take agents to the portal where all G.I.C.I. E-applications are quoted & submitted.

(Please Note: This portal will **NOT** display active policy status or commission information, as that information is available under the 'Reports' tab on **MYCBL**.)

## Billing & Effective Dates

All C.I. applications are processed within 3-5 business days on average and can go in effect any day **1<sup>st</sup>-28<sup>th</sup>** of the month, and can be paid via **EFT** or **Credit/Debit Card**. (**MC & AMEX Not Accepted**)

(If Clients wish to pay on a Quarterly, Semi-Annual, or Annual basis then a Paper App needs to be submitted w/ a Live Check. List Bills also require paper applications and a minimum of 3 applicants.)

## Signatures

▪ **Email for Signature (Remote/Not Present)** - Use this option to send an email to all individuals who need to sign the application. The e-mail will include a link to access a secure website to review and electronically sign the application. The individual signing the app will enter the last 4 digits of their Social Security Number to verify their identity and gain access to sign the application. You will receive an email confirmation once all parties have signed the application.

▪ **Sign on Screen (Present)** - Allows the client to review the application, then sign on the screen while the agent is either with them in person or is sharing the screen and handing over PC control to the client.

**\*\*IMPORTANT\*\*** When all signatures are complete agents will hit a final 'Submit' button to upload the E-App to the policy processing team. **This Completes the New Enrollment!**



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