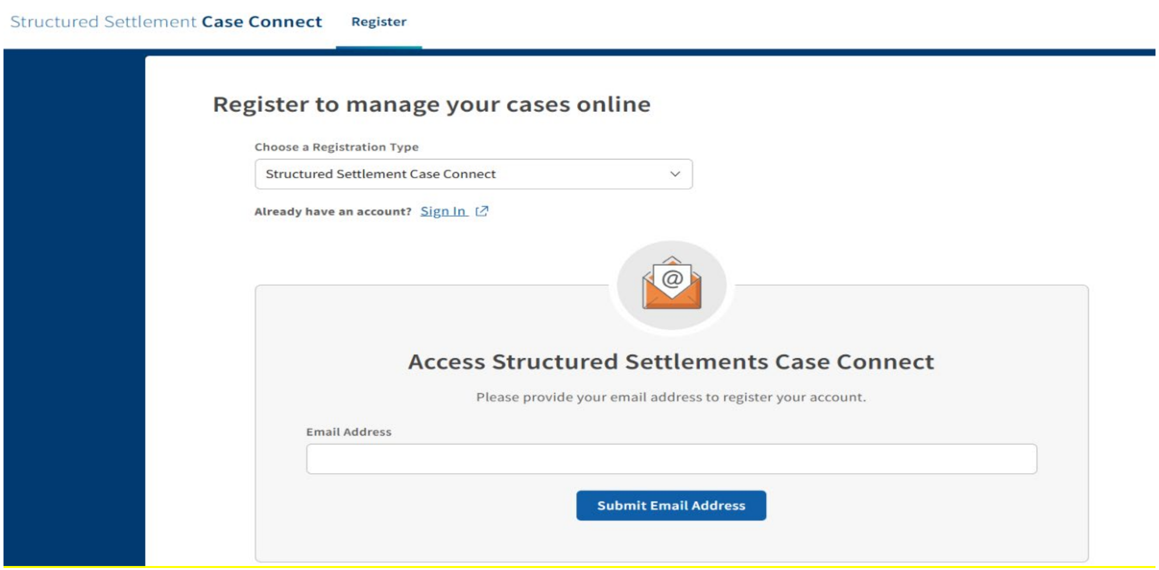
Case Connect Portal User Guide

Mutual of Omaha Insurance Company's (Mutual) Structured Settlement Case Connect portal is a web-based tool that will allow you the ability to upload documents at your convenience for each structured settlement case. It will display a list of the documents required for each claimant under the case and is available 24 hours a day, 7 days a week.

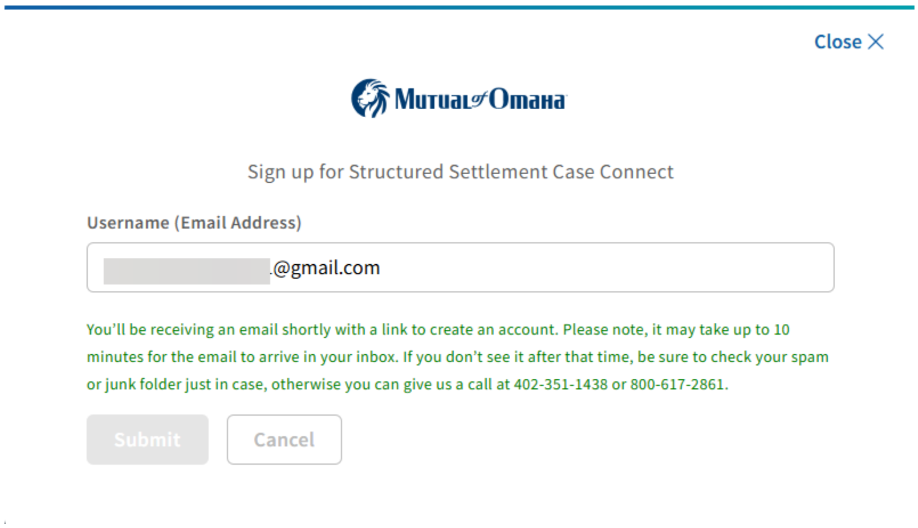
Case Connect will save you time, eliminate email limitations and enhance the security of your case documents. Once all documents have been uploaded into Case Connect in good order, our new business team will expedite the issuance of case contracts.

LOGIN

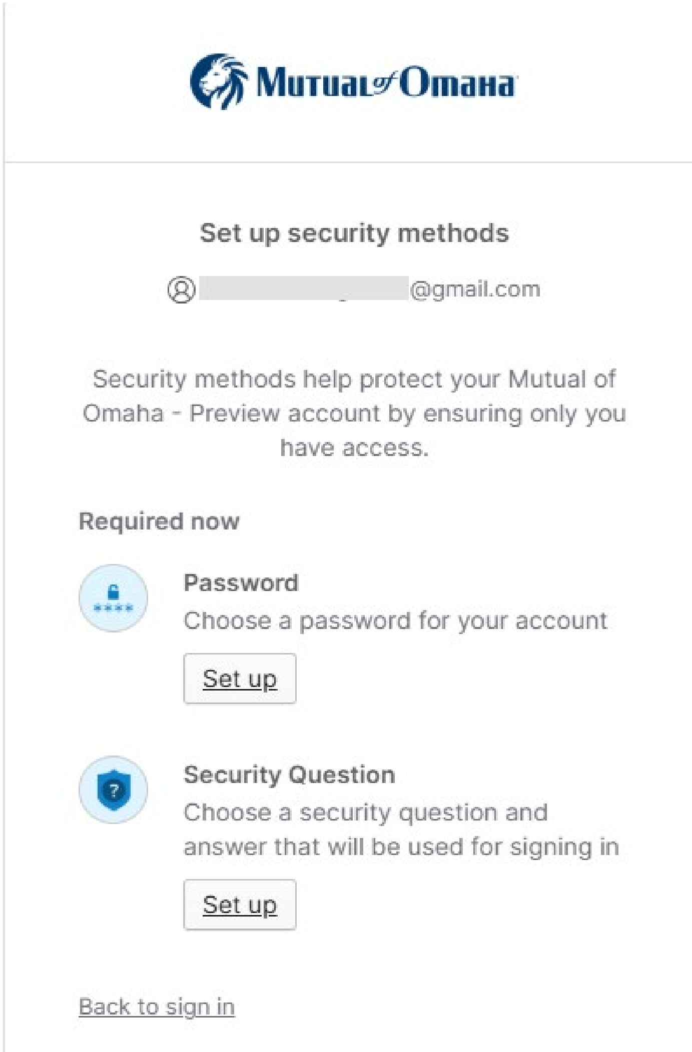
During your initial login to Case Connect, you will be asked to register to manage your cases online. The URL is https://hlx-registration.mutualofomaha.com/register/. Please mark this as a favorite for quick access.



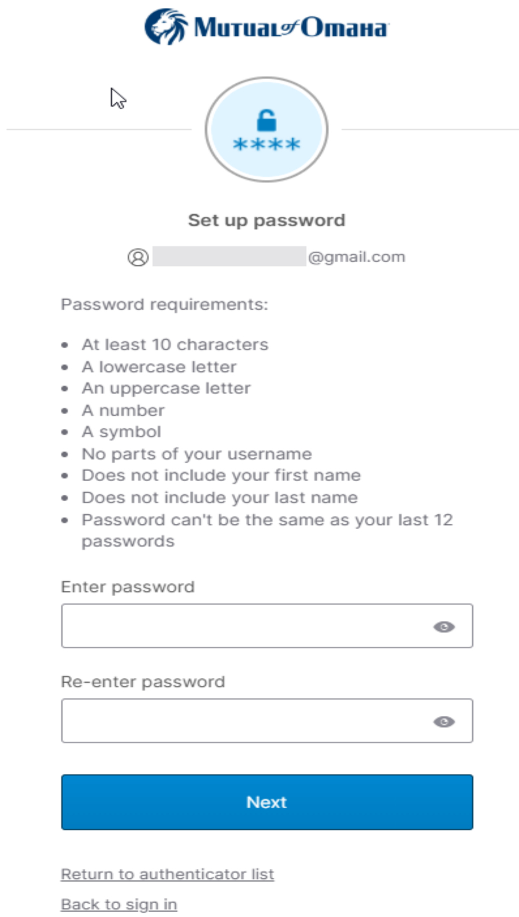
You will need to add your email address and click the "Submit Email Address" button. Once you have submitted your email address, you will receive a notification that states that you will be receiving an email shortly in your inbox with a link to create an account. Should you receive the error message "A user with this email address already exists", that indicates that you have already registered. You can proceed to the "Already have an account" and click "Sign In".



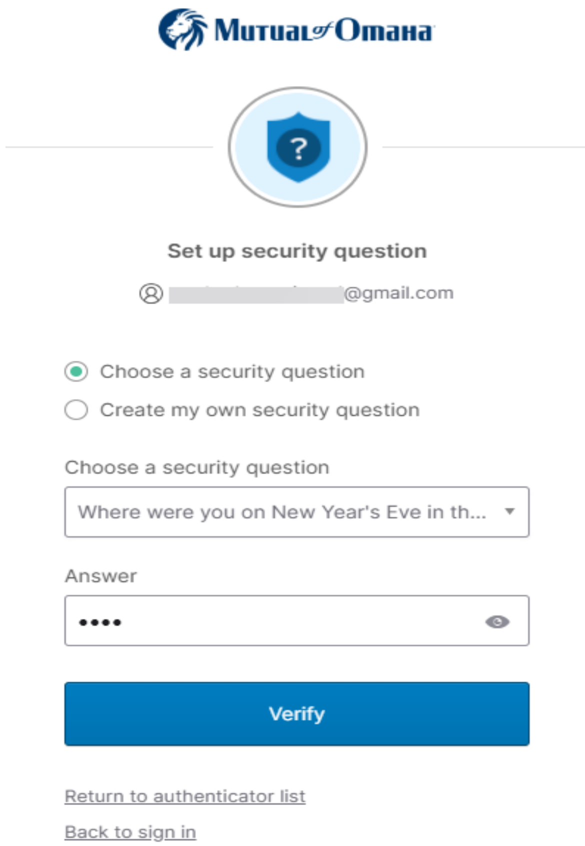
Go to your inbox to find the email notification to get started. Please note that it may take up to 10 minutes for the email to arrive in your inbox. If you don't see it after that time, be sure to check your spam or junk folder just in case. If you don't receive it, please call us at 402-351-1438 or 800-617-2861.
Click on the Activate Mutual of Omaha Account button to begin.



You will be prompted to set up your security method which includes setting up a password and selecting a security question and corresponding answer.

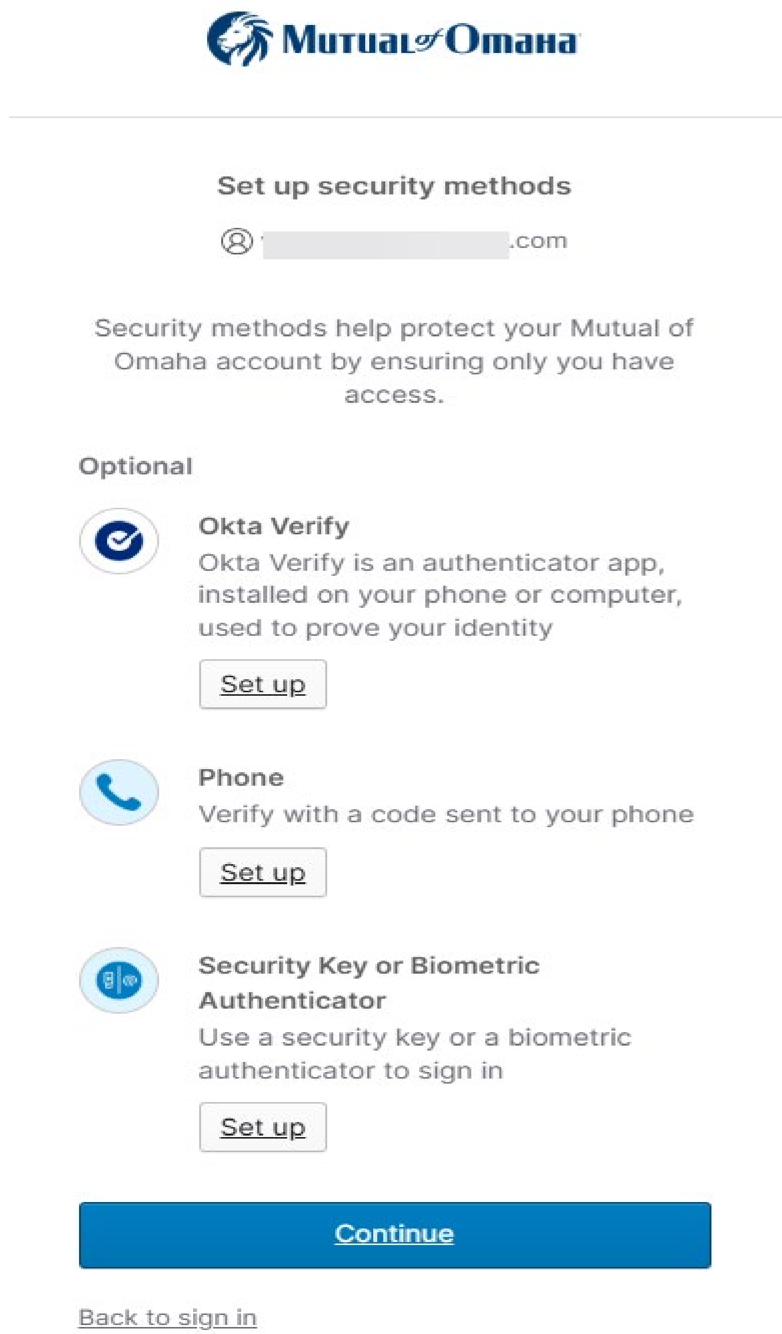


You will need to establish a password that adheres to the password requirements provided to ensure strong password protection. Enter the password twice and click the “Next” button.



As another layer of security, you have the option to either choose a security question from the drop-down box or you can create your own. Add your answer to this screen and once completed, click the "Verify" button to continue.

You are now ready to set up the multifactor authentication with either Okta Verify, SMS Authentication, Voice Call Authentication or Email Authentication.



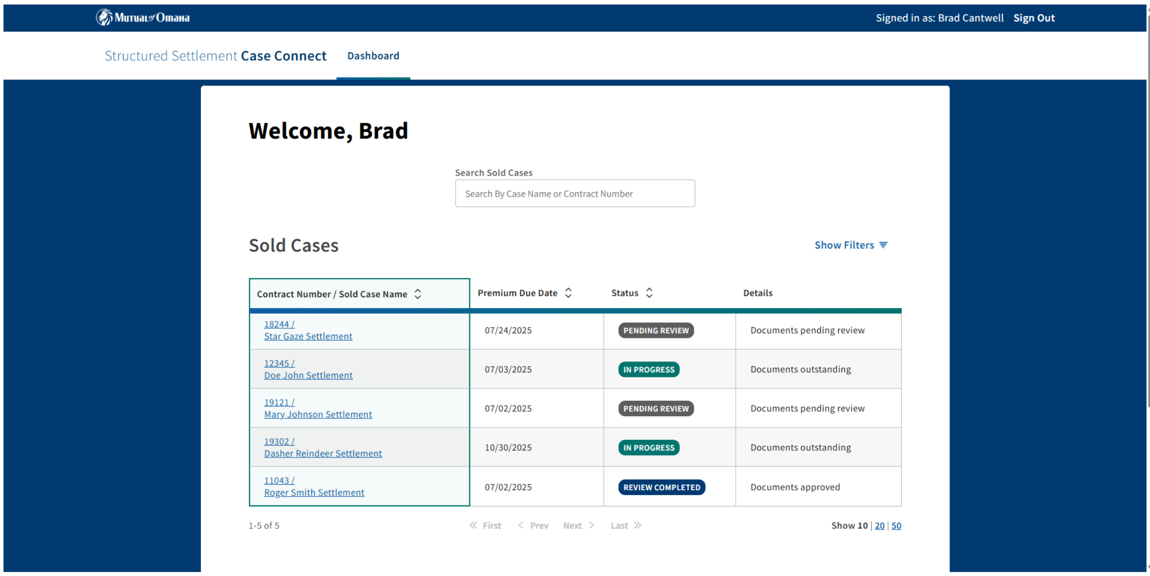
Should you choose the Okta Verify option, upon successful completion of Okta Verify set up, you will automatically be taken to the *Mutual of Omaha My Apps.* Click on the SSA Portal tile and you will be directed to the Case Connect sign in page. Enter your email address into the Username field and click the "Next" button, then enter your Password and click the "Verify" button. You will then receive a verification code on your personal device.

You should now be able to view your dashboard that provides access to all of your cases sold.

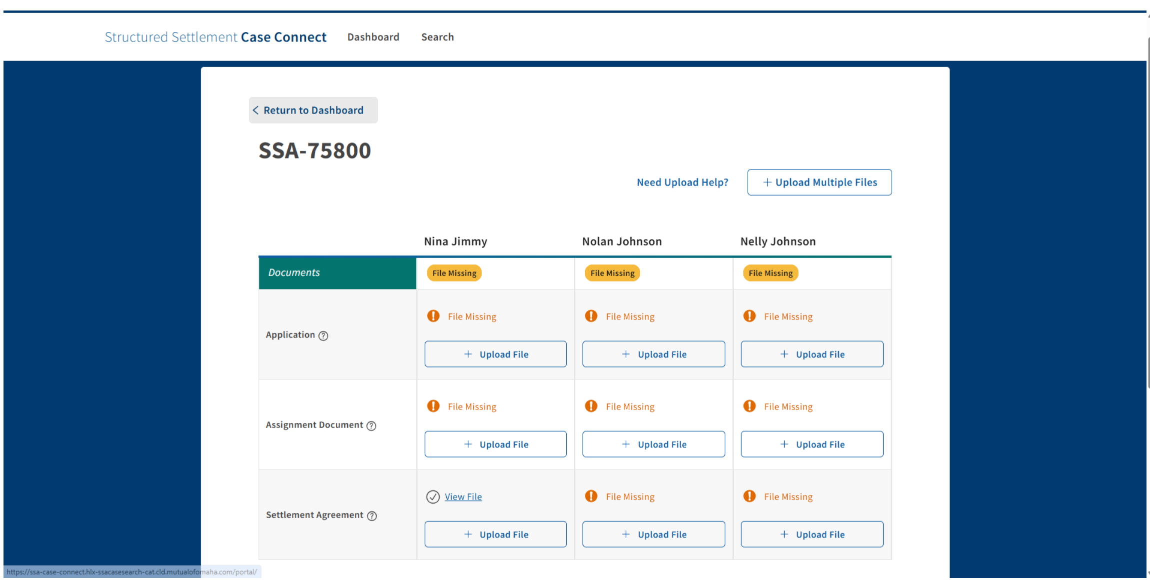
Workflow Guide

On the Dashboard you will have the ability to search for your sold cases by either case name or contract number. You can also locate a case by viewing the list of your sold cases.

The Premium Due Date, Status, and Details fields provide key information for each case, namely whether documents are outstanding (In Progress), documents have been received and are pending review by the underwriter (Pending Review) or the case is ready for contract issuance (Review Completed).

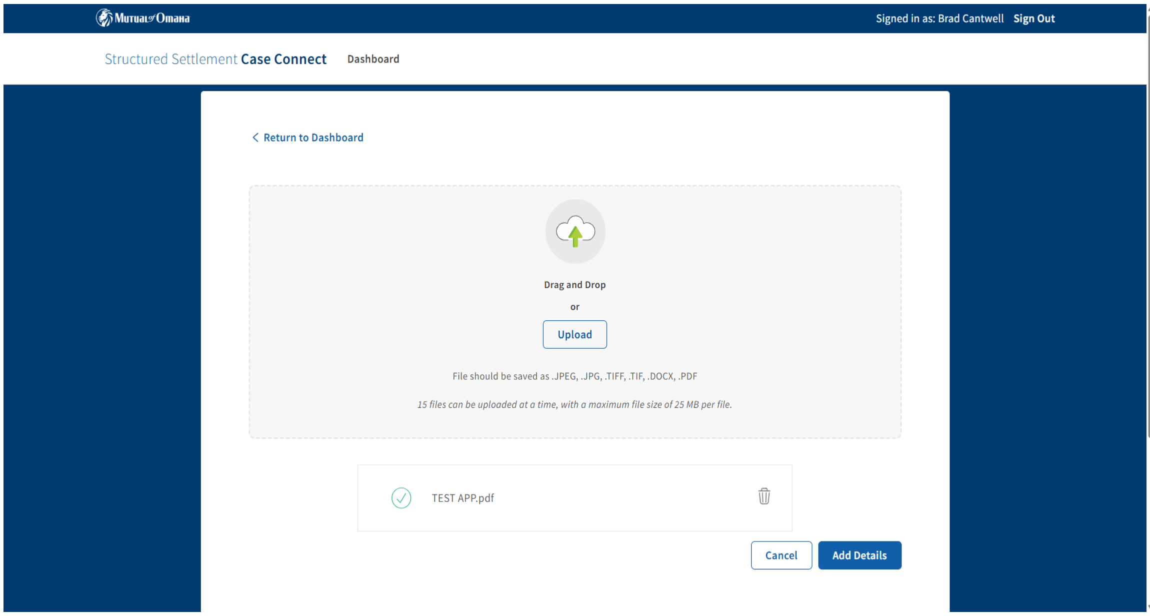


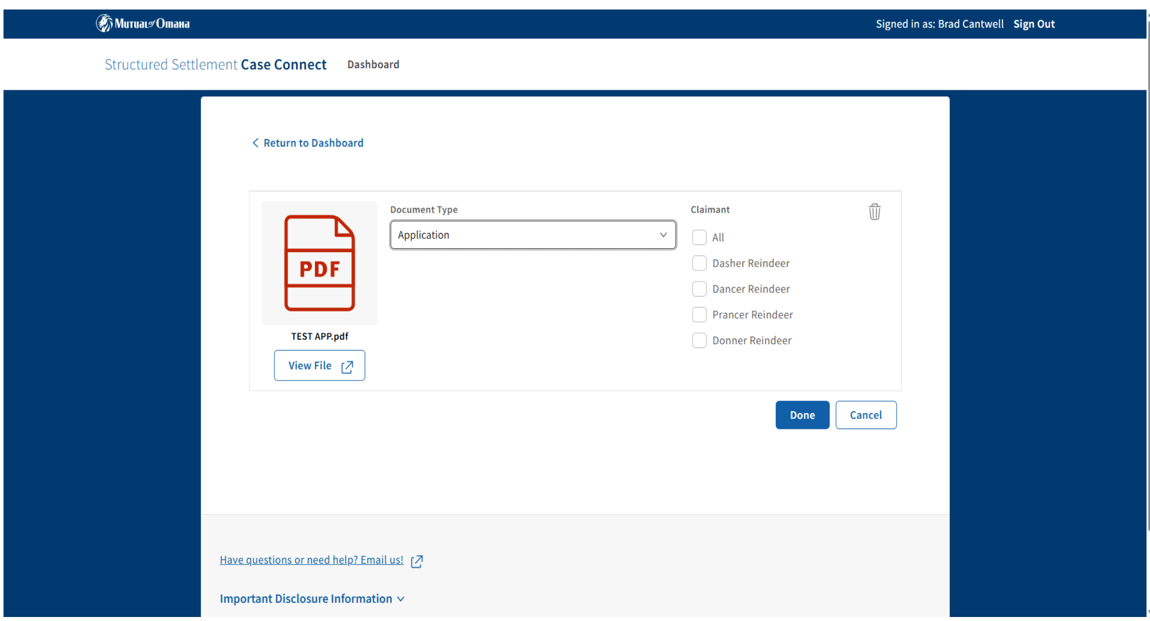
By clicking on the contract number to open the case, you can identify the documents that are needed or documents that are not in good order.



Once the specific case is open, you have the option to either "Drag and Drop" each document to the appropriate section or you can use the "Upload Multiple Files" option to add your documents to the case.

If you choose the Upload Multiple Files option, you can upload up to 15 files at a time with a maximum file size of 25 MB per file. The files should be saved as JPEG, JPG, TIFF, TIF, DOCX OR PDF. Please note that the following characters will not work when uploading the documents: ‘ % @ = [ ] : ; “ < > / \ ? * {}and you will receive an error message.





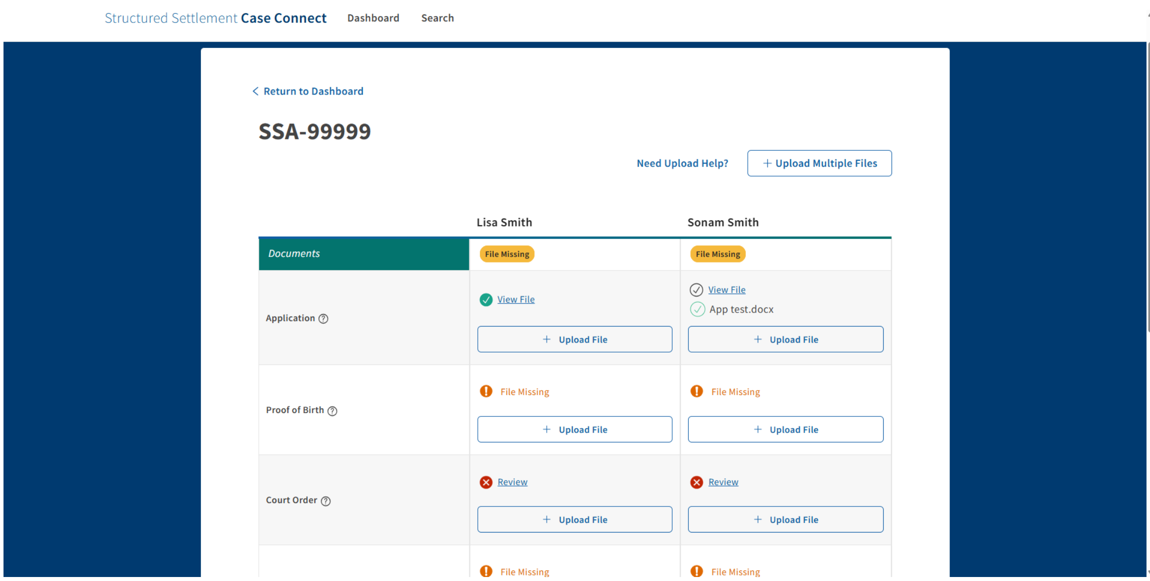
Simply click on the “Upload Multiple Files” button and then click on the “Upload” button. Select the documents you want to add to this case. Please include the details needed to identify what type of document it is and indicate if the document should be added to all claimants or just one specific claimant. Once identified, press the “Done” button and the documents will save to Case Connect.

After the application has been added, the Underwriting team will receive an email notification to review the case for the advancement of commissions once the premium has been received on the case.

Upon uploading the application, release agreement, court order, trust, guardianship, hold harmless, W-9 and/or proof of birth, as applicable, the Underwriting team will receive an email notification to review the applicable documents for acceptability and the release of the first payment.

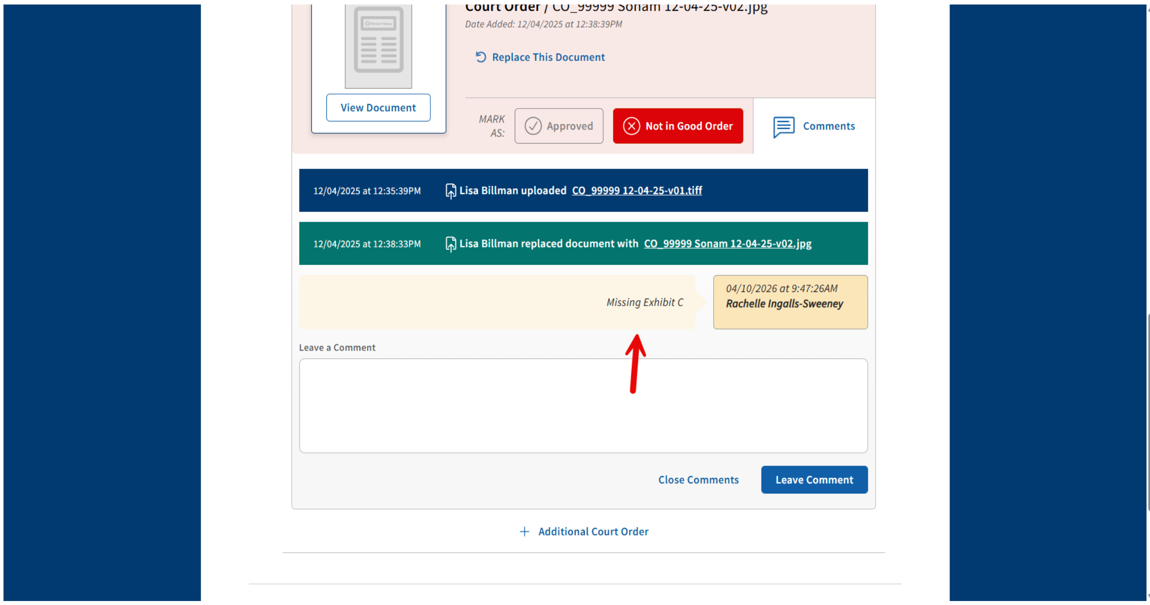
When the remaining documents have been added to the case, the Underwriting team will again receive notification to begin review of the case for final review and contract issuance.

How to Review the Documents



When you are on the specific case, you will see that there may be different statuses for the various documents. It includes a "Review" with the red X which indicates that the document is a not in good order, "File Missing" which denotes that the document is required but has not been uploaded, the "View File" which reflects that the document has not been reviewed by the underwriter or a Green check mark signifies that the document has been approved by the underwriter.

To determine why the application in this example has been noted as not in good order, you would click on the Review red X to open it and then click on the comment section to find that the court order is missing the Exhibit C. At this point you can either utilize the "Replace this Document" function to add the entire court order with the Exhibit C or just add the Exhibit C to the case.



Additional functions in Case Connect

When do I use the "Replace This Document" function?
If a document is determined to be not in good order by the underwriter, you can update the document and then use the "Replace This Document" function to replace the document that is already on file. Please note that this will not delete the original file from Case Connect but will update it with the current version.

When do I use the "Edit Details" function?
Should you determine that the Document Type has been labeled incorrectly or it has been applied to an incorrect Claimant, simply press the "Edit Details" button to make those adjustments and add a comment to indicate what needs to be changed.

How do I find only my cases that are "Review Completed", "In Progress" or "Pending Review"?
On the dashboard page, you can find the "Show Filters" on the top right-hand side of the page. Simply click on the box and you will be able to locate your sold cases in the different stages of status.

What are the different types of help buttons to assist as I become familiar with Case Connect?
When you open a specific case you will find the "Need Upload Help?" button next to the "Upload Multiple Files" button. Simply click on the "Need Upload Help" button and this will provide additional information on the upload process.

Next to each document type on a specific case you will find a "?" which you can click on to find additional information related to pertinent requirement for that document.

Frequently Asked Questions

How long will it take for my contract to be issued? The contract will be issued within the next 10 business days.

Can I submit just the application to obtain the advancement of commission once the premium has been applied to the case? Yes, you can add the application(s) to Case Connect and the underwriting team will be notified to review the case for the release of the commission.

Should you have any questions, please email us at structuredsettlements@mutualofomaha.com or call us at 800-817-2861 or 402-351-1438.