Central States Health and Life Co. of Omaha Performance and Participation Reporting

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CSO's Performance and Participation system is designed to provide a variety of reporting options to your organization for tracking your credit insurance sales. Many of these reports have the capability to prepare subtotals at client defined levels, i.e., Holding Company, Bank, District, State, Branch and Loan Officer.

Bank Setup

Bank Admin Tab

Before accessing the Performance and Participation system, CSO will complete the initial set-up for your bank. This will include the initial setup of all branch names and loan officer names. The following options are available from the Bank Admin section of the website.

Home Contact FileUpload Reports Bank	Admin	Hello BankAdmin! Log off							
Central States Health & Life Co. of Omaha All set up is done from the Bank Admin section of the website. Performance and Participation									
	Bank Administration								
Set up or change a new user Create, Update, List and Delete Users. Click Users Admin	Manage Bank Information Click Bank	Maintain Bank Branch Information Click Branch							
Maintain Loan Officer Information Click Loan Officer	Maintain Loan Eligibility Information Click Loan Eligibility	Maintain Bank and District/Region Names Information Click Bank Names							
Maintain Batches sent to CSO Click Batches									

 Manage Bank Information - A bank record will be created with an indicator of how the reports will roll up. The reports for this bank will roll up by branch and loan officer. These options can by modified by you should you want additional roll ups.

Bank	Bank List										
Holding Bank Code	Holding Bank Name	State	Account	Roll Up by Holding Co?	Roll Up by Bank?	Roll Up by District?	Roll Up by State?	Roll Up by Branch?	Roll Up by Loan Officer?	Last Update Date	
TestBk1	Test Bank 1	NE	0000012345	Not Set 🗸	Not Set 🗸	Not Set 🗸	Not Set 🗸	True V	True 🗸	8/17/2015 2:50:59 PM	Edit Details Delete

- Set up or Change a New User CSO will set up the administrator for your bank. The administrator at the bank will be responsible for setting up any new users. To create a new user, select Users Admin under the Set up or change a new user from the bank admin page.
 - Select Create New from the User List page.

Home Contact FileUpl	oad Reports	Bank Admin	Hello BankAdmin!	Log off
Central States Health & Life Co.	O of Omaha		Performance and Participation	
User List				

 All fields are required to create a new user. Enter the information, check the Standard User box, and click Create. A Standard User is allowed to upload files and generate reports but cannot perform any of the Bank Admin functions.

Create.							
Create a new user account							
Test Bank 1							
User name	Joe User						
Email address	joeuser@testbank1.com						
Password							
Confirm password	•••••						
Select User Role	StandardUser						
	Create						

 The User List displays all of the users that can access the Performance and Participation system. From this list, you can edit a person's access or reset their password, delete them, or view details regarding the user.

User List Create New							
User Name	Bank Name	Role					
BankAdmin	Test Bank 1	BankAdmin	Edit Details Delete				
Joe User	Test Bank 1	StandardUser	Edit Details Delete				

• **Maintain Loan Eligibility Information** – CSO will enter the maximum credit insurance limit information for the bank.

Loan Eligibility List Create New									
Max Loan Amount	Max Loan Term	Max Per Pmt	Loan Type	Last Update Date	Holding Bank Name				
100000	120	1000	A	8/17/2015 3:32:20 PM	Test Bank 1	Edit Details Delete			
100000	120		L	8/17/2015 3:32:38 PM	Test Bank 1	Edit Details Delete			

The following information can be manually entered or uploaded by either CSO or the bank:

- **Branch Location Information** To load the branch information, select Maintain Bank Branch Information from the Bank Administration Page.
 - You can load each branch manually or they can be uploaded from a file.

Branch List	Select Crea	te New to Add a Branch Manually		
Upload spreadsheet		Select Upload Spreadsheet to Load Sev from a .csv file or Excel spreads	eral Branches sheet.	
Branch Code	Branch Name	Account Last	Update Date	Holding Bank Name
Back to Bank Admin				

- To upload a file, select Upload Spreadsheet. The file must contain the branch code and branch name in the format listed on the screen.
 - Select Choose File and select the file you wish to upload.

• If the first row of your file contains headings, check the box before 'Column Names in the first data row?'.

Choose File BranchUpload.xlsx									
Column Names in the first data row?									
Upload									
File layout for uploads to the Performance and Participation System									
Files uploaded must contain column data in the order specified. Columns in bold are required. Files uploaded can									
iles uploa	ded must contain colu	umn data in the o	rder specified.	Columns in bold are required. Files uploaded can					
iles uploa e in any o • xlsx	ded must contain coll f the following format	umn data in the o s:	rder specified.	Columns in bold are required. Files uploaded can					
iles uploa e in any o • xlsx • xls	ded must contain colu f the following format	umn data in the o s:	rder specified.	Columns in bold are required. Files uploaded can					
iles uploa e in any o • xlsx • xls • csv	ded must contain colu f the following format	umn data in the o s:	rder specified.	Columns in bold are required. Files uploaded can					
iles uploa e in any o • xlsx • xls • csv	ded must contain colu f the following format	Imn data in the o	rder specified.	Columns in bold are required. Files uploaded can					
iles uploa e in any o • xlsx • xls • csv Column	ded must contain colu f the following format Definition	Imn data in the o	rder specified.	Columns in bold are required. Files uploaded can Description					
iles uploa e in any o • xlsx • xls • csv Column	ded must contain colu f the following format Definition Branch Code	umn data in the or s: Type Text	rder specified.	Columns in bold are required. Files uploaded can Description Branch Location identifier.					

Back to List

• Select Upload – The screen will display the number of records successfully uploaded.

Home	Contact	FileUpload	Reports	Bank Admin	Hello Bank#
Central St	ates Health a	SC & Life Co. of On) naha		Performance and Participation
New Column Upload 2 Reco	Branc	Browse Browse he first data row bloaded S	tion U _l	pload Fo fully!!	r Test Bank 1

 To enter an individual branch, select Create New and enter the Branch Code and Branch Name and select Create. The account is option.

Home Contact Filel	Jpload Reports Bank Admin	Hello BankAdmin!	Log off	
Central States Health & Life C	to. of Omaha	Performance and Participation		
Create Branch Location Test Bank 1				
Branch Code	B1			
Branch Name	Branch 1			
Account				
	Create			

- **Loan Officer Information** To load the loan officer information, select Maintain Loan Information from the Bank Administration Page.
 - You can load each loan officer manually or they can be uploaded from a file.

Central States Health & Life Co.	O	Performa	nce and
	of Omaha	Particip	pation
Loan Officer Lis	Select Create New to Add a Loan	Officer Manually	
Create New	Select Upload Spreadsh	Set to Load Several Loan Officers	
Upload spreadsheet	from a .csv file	or Excel spreadsheet.	
Loan Officer Code	Loan Officer Name	Last Update Date	Holding Bank Name

- To upload a loan officer file, select Upload Spreadsheet. The file must contain the Loan Officer Code and Loan Officer Name. These fields must be in the format listed on the screen.
 - Select Choose File and select the file you wish to upload.
 - If the first row of your file contains headings, check the box before 'Column Names in the first data row?'.

	Luan Onic			I ESI DAIIK I
Choose F	ile LoanOfficerUploa	id.xlsx		
Column	Names in the first da	ta row?		
Upload				
File layou	for uploads to the	Performance and	d Participatio	n System
Files uploa	ded must contain colu	imn data in the or	rder specified.	Columns in bold are required. Files uploaded can
Files uploa be in any o vlsx	ded must contain colu f the following formate	imn data in the or s:	rder specified.	Columns in bold are required. Files uploaded can
Files uploa be in any o • xlsx • xls	ded must contain colu f the following formats	ımn data in the or s:	rder specified.	Columns in bold are required. Files uploaded can
Files uploa be in any o • xlsx • xls • csv	ded must contain colu f the following format	ımn data in the or s:	rder specified.	Columns in bold are required. Files uploaded can
Files uploa be in any o xlsx xls csv Column	ded must contain colu f the following formats Definition	Imn data in the or S: Type	Length	Columns in bold are required. Files uploaded can Description
Files uploa be in any c • xlsx • xls • csv Column	ded must contain colu f the following formats Definition Officer Code	Imn data in the or s: Type Text	Length	Columns in bold are required. Files uploaded can Description Loan Officer identifier.

• Select Upload – The screen will display the number of records successfully uploaded.

New Loan Officer Upload For Test Bank 1

Choose File No file chosen

Column Names in the first data row?

Upload

5 Records Uploaded Successfully!!

 To enter an individual loan officer, select Create New. Enter the Loan Officer Code and Loan Officer Name and select Create.



 You can also edit or delete the loan officer information by clicking on 'Edit' or 'Delete' to the right of each loan officer entry.

- Bank and District/Region Information Most banks do not have separate reporting by bank and district/regions, but the option is available. Select Maintain Bank and District/Region Names Information from the Bank Administration page. If the Bank or District/Region code is provided on the monthly input file, it will allow you to do reporting at this level.
 - To add a record, enter the code, description, and select whether you are adding a bank or a district/region and then select Create New.

Central States Health & Life	Co. of Omaha	Performance and Participation
Create Code Lookup Test Bank 1		
Code Description Code Type	C1 Central Region DistrictRegion •	
	Create	

• Manage Batches sent to CSO – This section of the website allows you to view the batches sent to CSO. From this page you can view the details of a batch, delete a bank or modify individual items in the batch.

List of Batches	Received			
DateAdded	Batch Status	LastUpdateDate	Holding Bank Name	
9/16/2015 3:34:58 PM		9/16/2015 3:34:58 PM	Test Bank 1	Details Delete Items in Batch
9/18/2015 10:07:55 AM		9/18/2015 10:07:55 AM	Test Bank 1	Details Delete Items in Batch
Back to Bank Admin				

Monthly Reporting

Log into the Performance and Participation system.

Home Contact	Log in
Central States Health & Life Co. of Omaha	Performance and Participation
© 2015 - CSO Performance and Participation	Select Log in from the Home Page.

Enter your User Name and Password then select Log In.

Home Conta	ct		Log in
Central States Hea	Ith & Life Co. of Omaha	Performance and Participation	
Log in. Use a local acc	count to log in.		
User name	BankAdmin		
Password	•••••		
	Remember me?		
	Log in		
Forget your passwo	ord?		

<u>FileUpload Tab</u>

This section of the website allows you to upload your monthly loan information. You will need to create your monthly loan file in the format listed on the FileUpload section of the website in a .csv (Comma Separated Value) or an Excel file.

• Select FileUpload



• The next screen shows you the format required for your monthly loan file. You can download a sample input file as a CSV or Excel file with or without headings.

Central Sta	Ites Health & Life Co. of Ome	ha		Perfor Part	manc ticipat	e and ion	
Column Upload	Jpload For Te Browse Names in the first data row?	st Bank	1	ystem		Your Monthly Loar must be in this or and format.	n File rder
es uploa any of th • xisx • xis • csv here is a l	ded must contain column dats e following formats: link below to sample files for c	a in the order sp iownload that c	ecified. Co an be used	Numns in bold are required. Files uplo	o the system.	/	
Column	Definition	Туре	Longth	Description	F	1	
1	Holding Company Code	Text	10	Highest level of reporting. Unique code to the name of the corporation or company want to report on.	that will be used to identify that owns all banks that you		
2	Bank Name Code	Text	10	Unique code that will used to identify the	e bank name.		
3	District/Region Code	Text	10	Use this field to report by District or Reg	lon		
4	State	Text	2	Two digit State Abbreviation			
5	Branch Code	Text	10	Branch location identifier			
6	Officer Code	Text	10	Loan Officer identifier. The month and year that this loan should	d be posted as to the P&P		
7	Post Date	MMYYYYY	6	Examples: 092014 or 09/2014			
8	Transaction Date	MMDDYYYY	8	Examples: 09152014 or 09/15/2014			
9	Loan ID	Text	12	Unique number that identifies the loan			
10	Life Refund Amount	Numeric	7	If premium was refunded on an existing Refund Amount in this field. Include up t Example: 234.12	ioan, place the Credit Life o 2 decimal places.		
11	A&H Refund Amount	Numeric	7	If premium was refunded on an existing Disability Refund Amount in this field. In places. Example: 234.12	ioan, place the Credit clude up to 2 decimal		
12	Note Principal	Numeric	9	The amount financed. Include up to 2 d Example:35234.12	ecimal places.		
13	Total Note	Numeric	9	Example:35234.12	normal proces.		
14	Annual Percentage Rate	Numeric	5	Annual Percentage Rate of the loan. Include up to 4 decimal places. Example	e 0.06		
15	Loan Term (in months)	Numeric	3	The number of months financed.			
16	Insurance Term (in months)	Numeric	3	The length of the insurance term in mon the loan term.	ths. This could be less than		
17	Life Premium Written	Numeric	7	The amount of Credit Life Premium in do to 2 decimal places. Example: 205.03	pliars and cents. Include up		
18	A&H Premium Written	Numeric	7	The amount of Disability Life Premium In up to 2 decimal places. Example: 205.0	dollars and cents. Include		
19	Life Eligibility Indicator	Text	1	Defaults to "Y". Place "N" if loan ineligib	ie		
20	A&H Eligibility Indicator	Text	1	Defaults to "Y". Place "N" if loan ineligib	le		
يتقسم ولي	tels in balid are required		-		Select this li	nk to download a	
	- · · · · ·				across tilla li	in to dominoud a	

• Here's a sample of the file in an Excel format.

HoldingCo	BankCode	DistrictCode	State	BranchCode	OfficerCode	PostDate	TranDate	Loanid	LFRefAmt	AHRefAmt	Principal	TotalNote	APR	LoanTerm	InsTerm	LfPrem	AHPrem	LifeEligInd	AHEligInc
TestBk1			NE	B1	1234	092015	9/2/2015	123456			10000	11000	0.0375	48	48	200	98.5	γ	γ
TestBk1			NE	B1	1234	09/2015	9/25/2015	234567			20000	22150.5	0.065	60	60	300	187.65	γ	γ
TestBk1			NE	B5	4567	092015	9152015	345678			15000	17000	0.05	60	60	250	122.5	γ	γ
TestBk1			NE	B5	4567	092015	9152015	456789			17500	19750	0.045	72	72	350	200	γ	Y

- Create and save your file in the format indicated above. This file can be created manually or extracted from your existing system.
 - Browse for the file.
 - If the first row of your file contains the column names, check the box.

Select upload.

Home Contact FileUpload Reports Bank Admin	Hello BankAdmin! Log off
Central States Health & Life Co. of Ornaha	Performance and Participation
File Upload For Test Bank 1 G:wrk grptistsystdjwblo Browse. Column Names in the first data row? Upload If the file contains an error, it will be upload the file again	De displayed immediately. Correct the information and
File Upload For Test	Bank 1
Browse	
Column Names in the first data row?	
Upload	
File Uploaded Failed!! Life	Elig must be N or Y for record number 3
Once all errors are corrected, a me uploaded.	ssage will appear indicated the records were successfully
Home Contact FileUpload Reports Bank Admi	in Hello BankAdmin! Log off
Central States Health & Life Co. of Omaha	Performance and Participation
File Upload For Test Bank 1 Browse Column Names in the first data row? Upload 4 Records Uploaded Successfully!!	

- If the file uploaded was correct, you can now create your monthly reports. If the file was incomplete or incorrect, you can upload a new file.
 - Select Bank Admin.

Maintain Batches sent to CSO

Select Bank Admin and then Under Maintain Batches sent to CSO, select Batches.



- From the List of Batches Received, you can view the Details, Delete a File, or Update an Item in the Batch.
 - If you would like to delete the entire file and upload a new file, select Delete and then go back to FileUpload to upload a new file.

List of Batches	s Received			
DateAdded	Batch Status	LastUpdateDate	Holding Bank Name	
9/16/2015 3:34:58 PM		9/16/2015 3:34:58 PM	Test Bank 1	Details Delete Items in Batch
9/18/2015 9:28:23 AM		9/18/2015 9:28:23 AM	Test Bank 1	Details Delete Items in Batch

• If you want to edit an individual record in a batch, i.e, to change the loan officer code, click on 'Items in Batch'. Click on Edit following the indicate record you want to update.

Record	ds in the Ba	atch																	
Holding Company Code	BankName District	State	Branch	OfficerCode	Post Date	TransactionDate	BankLoanid	LifeRefunciAmt	AHRefundAmt	Principal	TotalNotePmts	AnnualPctRate	LoanTerm	InsuranceTerm	LifePremiumWritten	AHPremiumWritten	LifeEligInd	AHEligind B	atch Status
TestBk1		NE	81	1234	092015	09022015	123456	0.00	0.00	10000.00	11000.00	0.0375	45	45	200.00	58.50	¥.	¥.	Edit Defense
Testlik 3		NE	81	1234	092015	09252015	234567	0.00	0.00	20000.00	22150.50	0.9650	60	60	300.00	187.85	¥	x	External Defails J Defails
TestEk1		NE	85	4567	092015	09152015	345678	0.00	0.00	15000.00	17000.00	0.0500	60	60	250.00	122.50	۷	Y	Edit Details Details
Testfik 1		NE	85	4567	092015	09152015	456789	0.00	0.00	17500.00	19750-00	0.0450	72	72	350.00	200.00	Y	X:	Exter j Details 1 Deteile
TestEk1		NE	81	1234	092015	09252015	567890	0.00	0.00	15000.00	17000.00	0.0500	60		0.00	0.00	Y	٧	Edit Detato Detete

• The values for the record selected will be displayed. Correct the corresponding field, i.e., the loan officer code and select Save.

-	
Edit Batch Item	
Holding Company Code	TestBk1
BankName	
District	
State	NE
Branch	B1
OfficerCode	1234
Post Date	092015
TransactionDate	09022015
BankLoanId	123456
LifeRefundAmt	0.00
AHRefundAmt	0.00
Principal	10000.00
TotalNotePmts	11000.00
AnnualPctRate	0.0375
LoanTerm	48
InsuranceTerm	48
LifePremiumWritten	200.00
AHPremiumWritten	98.50
LifeEligInd	Υ
AHEligInd	Υ
	Save

<u>Reports Tab</u>

The 3 main reports available are:

• **Performance and Participation Report** – This report is an overview of the loan and premium penetration for the month selected. This report allows you to select the Post Date for the report.

other Report		
e 092015		
llowing is a sample Performance a	nd Participation Rep	oort:
Central States Health & Life Co. of Omaha Performance & Participation Reports		Date: 9/18/2015 Page: 1
Holding Company Name: Test Bank 1		
Bank Name:		
District Name: Branch Name:		
Manager Name:		
For Month of: 09/2015		
Loan Volume		\$77,500.00
Total Loans		5
Total Eligible - Life		5
Total Eligible - A & H		5
Loans with Life Policies Loans with A&H Policies		4
	Loan	Premium
Performance %	Penetration	Penetration
Credit Life	80%	74 %
Accident & Health	80%	48 %
Total Performance %	80%	62 %
Average Loan		15,500.00
Average Term		60
Average Weighted Term		61.16
Current Month Premium	Gross	Net
Life A 8 H	1,100	1,100
Talal Barahar	609	609
i otal Premium	1,709	1,709
income		
rear-to-Date		
LIFE	27,663	22,065
Total Premium	28,272	22,674
Income	0	0

 Production Report – This report is a summary of the loan and premium information by period and roll up. This report allows you to select the Post Date, Period (MTD or YTD), and Rollup By (some options that may be available based on the bank setup are roll up by branch, district, etc.). Select the values and view report.

Select another Report									
Post Date <select a="" value=""> V Rollup By Branch V</select>	Period MTD V	View Report							

Following is a sample Production Report:

						Cen P	tral Sta erform	tes Hea ance & F	lth & Li Particip	fe Co. ation F	of Oma Reports	iha i			Date:	9/18	3/2015
Holdir	ng Comp	any Name:	Test Bank 1														
Repor	t Name:		Production Repo	ort - MTE	C												
For Me	onth of																
-	onar or.	0	9/2015	Num	ber of I	Loans		Performanc	e	Writ	ten Premiu	m	L	ost Premiur	n	Prem	
	onur or.	0		Num	ber of I	Loans igible		Performanc	e	Writ	ten Premiu	m	L	ost Premiur	n	Prem Prod	Loan
Bank	District	U! Branch	9/2015 - Branch Name	Num Insu Life	ber of I ured/Eli	Loans igible A&H	Life	Performanc A&H	e	Writ	ten Premiu A&H	m	Life	ost Premiun A&H	n	Prem Prod Pct	Loan Volume
Sank	District	Branch B1	Branch Name Branch 1	Num Insu Life 2	ber of I ured/Eli	Loans igible A&H 2	Life 3 08.0	Performanc A&H 7 08.67	e Total 66.67	Writ Life 500	ten Premiu A&H 286	m Total 786	Life 383	OST Premiur A&H 658	n Total 1,040	Prem Prod Pct 43.00 %	Loan Volume 45,000
Bank	District	Branch B1 B5	- Branch Name Branch 1 Branch 5	Num Insu Life 2 2	ber of I ured/Eli	Loans igible A&H 2 2	Life 3 06.0 2 10	Performanc A&H 7 68.67 0 100	e Total 66.67 100	Urit Life 500 600	A&H 286 323	m Total 786 923	Life 383 0	A&H 658 0	n Total 1,040 0	Prem Prod Pct 43.00 %	Loan Volume 45,000 32,500

 Loan Officer Production Report - This report is a summary of the loan and premium information by loan officer. This report allows you to select the Post Date, the Period (MTD or YTD), and the Rollup By. The default rollup is Holding Company. This will show all loan officers and a grand total for the Holding Company. If you select Rollup by Branch, a separate page will generate for each branch. The report will show all of the loan officers for the branch along with individual branch totals. Select the values and view report.

ſ	Select another Report								
	Post Date	092015 🗸	Period M	MTD Y		View Report			
	Rollup By	Branch 🗸							

• Following is a sample Production Report by Holding Company:

						Cei	ntral S	tates I	lealth a	& Life C	co. of C)maha			D	ate:	9/18/201
						F	Perforr	nance	& Part	icipatio	on Rep	orts			P	age:	1
Holding Cor	mpany Name:	Test Bank	1														
Report Name		Loan Officer	Produ	ction	Report	- MT	D										
For Month of	. no	9/2015															
r or monar of		/2015															
		_	Nun	1ber o	f Loans		P	erformanc	e	Writ	ten Premiu	m	L	ost Premiur	n	Prem	
		-	Nun	nber o ured/E	f Loans Eligible		Pe	erformanc	e	Writ	ten Premiu	im	L	ost Premiur	n	Prem Prod	Loan
Officer Code	Loan Officer Nat	-	Nun Ins Life	nber o ured/E	f Loans Eligible A&H		Pe	erformanc A&H	e Total	Writ Life	ten Premiu A&H	im Total	Life	ost Premiur A&H	n Total	Prem Prod Pct	Loan Volume
Officer Code	Loan Officer Nar Peter Pan	me	Nun Ins Life 2	nber o ured/E 2	f Loans Eligible A&H 2	2	Pe Life 100	A&H 100	e Total	Writ Life 600	ten Premiu A&H 323	m Total 923	L Life	ost Premiur A&H	m Total	Prem Prod Pct	Loan Volume 32,500
Officer Code 4567 1234	Loan Officer Nar Peter Pan John Doe	-	Nun Ins Life 2 2	nber o ured/E 2 3	f Loans Eligible A&H 2 2	2 3	Pr Life 100 68.67	A&H 100 66.67	e Total 100 66.67	Writ Life 600 500	ten Premiu A&H 323 288	m Total 923 786	Life 0 383	ost Premiur A&H 0 658	m Total 0 1.040	Prem Prod Pct 100.00 % 43.00 %	Loan Volume 32,500 45,000

• Following is a sample Production Report by Branch:

					Cen	tral	States	Healt	h & Lif	e Co. o	f Omal	ha			Date:	9/3	0/2015
					P	erfo	ormano	:e & P	articipa	tion R	eports				Page:		2
Holding	Company Nan	^{ie:} Test Bank 1															
Report N	ame:	Loan Officer Pro	duction I	Repor	t - MTC	C											
For Mont	h of:	09/2015															
			Nur	nber o	f Loans		P	erformanc	e	Writ	tten Premiu	ım	L	ost Premiur	n	Prem	
			Ins	ured/E	ligible											Prod	Loan
Branch	Officer Code	Loan Officer Name	Life		A&H		Life	A&H	Total	Life	A&H	Total	Life	A&H	Total	Pct	Volume
B5	4587	Peter Pan	2	2	2	2	100	100	100	600	323	923	0	0	0	100.00 %	32,500
		Branch Total	2	2	2	2	100	100	100	600	323	923	0	0	0	100.00 %	32,500
		Grand Total	4	5	4	5	80	80	80	1,100	609	1,709	383	658	1,040	62.15 %	77,500

• To run your monthly reports, select Reports.



- To view the list of reports available to your bank, select the down arrow following the report name initially displayed.
 - o Select the Report Name.
 - o Select Go to Report.

Select Desired Report Reports							
Report Name	Performance and Participation Report						

- For the Performance and Participation Report, select the Post Date (mmyyyy) by clicking on the down arrow. Other reports may have additional selections, i.e., period, and roll up.
- o Select View Report.

Select another Report	
Post Date 092015	View Report

 The report will be displayed in your browser window. From this screen, you can open/save the report in any of the formats listed. These same options are available for any of the reports. The most common format will be PDF.

Select another Report			
Post Date 092015			View Rep
I4 4 1 of 1 ▷ ▷I 4 Find ↑	Vext 💽 💿		
Central States Health & Life Co. of Omaha Performance & Participation Reports Holding Company Name: Test Bank 1 Bank Name: District Name: Branch Name: Manager Name: For Month of: 09/2015	XML file with repor CSV (comma delim PDF MHTML (web archi Excel TTFF file Word	t data te: 9/18/2015 itted) ge: 1 ve)	
Loan Volume		\$77,500.00	
Total Loans		5	
Total Eligible - Life		5	
Total Eligible - A & H		5	
Loans with Life Policies		4	
Loans with A&H Policies		4	
Performance %	Loan Penetration	Premium Penetration	
Credit Life	80%	74 %	
Accident & Health	80%	48 %	

• If you select PDF, Adobe Reader will open and you will have all of the Adobe options available to you that will allow you to save, print, etc., the report.

🔁 Production Report.pdf - Adobe Reader		
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Central States Health & Life Co. of Omaha Performance & Participation Reports	Date: 9/18/2 Page:	2015 1
Holding Company Name: Test Bank 1		
Bank Name: District Name: Branch Name: Manager Name:		
For Month of: 09/2015		
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	Loan Premium Penetration Penetration	
Performance %		

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