

Document Type	Definition	Notes (Optional)
APPI	Life Application Part 1 and related documents	Includes Application Part 1, Work Sheet, Conditional Receipt, Temporary Insurance Agreement (TIA), Limited Insurance Agreement (LIA)
APPII	Life Medical Part II and related documents	Includes Application Part II, Non-Medical, Paramed, Non-Medical Declaration, Unsigned Telemed, Signed Telemed, other company exam forms
ILLUS	Illustrations and related documents	Includes Illustration, Non-illustration forms
NBFORM	New Business Administrative Forms and related documents	Includes HIV Authorization, Replacement Forms, Interim Conditional Receipt, Conditional Receipt, Authorization Forms, Disclosure Statements
CORRESP	Correspondence and related documents	Includes Initial Cover letter / transmittal, Correspondence from GA/Agent, Correspondence from Provider, Correspondence from Proposed Insured - including requests for release of medical information, Resident Alien Card, any attached notes, AGENT REPORT, MIB FORMS
INSP	Inspection Reports and related documents	Includes Personal Inspection Reports, Business / Beneficiary Inspection Reports, Credit Reports
DELIVREQ	Mail / Delivery Requirements and related documents	Correspondence and documents for delivery of policy, including Delivery Requirement Cover Letter, Policy Delivery Acknowledgement (PDA) / Receipt, Backdate Notice, Returned Original Policy, Good Health Statement, Amendment to Application
QUEST	Questionnaires and related documents	Includes Coronary Artery Disease, Applicant Chest Pain, Seizure Disorder, Applicant Diabetic, Alcohol Abuse, Aviation, Tobacco Use Statement, Underwater / Sky Sports, Racing, Business Insurance, Foreign Resident / Travel, Mountain / Rock / Ice Climbing, Resident Alien, Drug Use, Life Style
SUPPAPP	Supplemental Applications and related documents	Supplemental coverage attached to base policy (if a separate form is used) including Child Rider, Spousal Rider
1035	1035 Information and related documents	Correspondence related to a 1035 exchange transaction to transfer cash value from one carrier to another, including Other Carrier's Check, 1035 exchange memorandum, 1035 exchange paperwork, Cost Basis Information, Minimum Deposit ResQ Worksheet, Memorandums, Loan Transfer, Letters, check stubs from Surrender Company, Statement regarding Tax Advantage Policies
TAX	Tax Forms and related documents	Any tax forms including 1099R, 5498, W9, etc.

Document Type	Definition	Notes (Optional)
APS	Attending Physicians Statement and related documents	Doctor notes related to history of medical condition and care (can include Lab and EKG if came as part of the APS) including Attending Physicians Statement, Reports, Office and Hospital Records, Pulmonary Function Tests, Blood Pressure Recheck, Agent reimbursement for APS
EKG	EKG / Cardio Reports and related documents	Includes Tracings, Interpretations, X-ray Copies, X-ray Reports / Interpretations, Holter Monitor, Echo Results,
MVR	Motor Vehicle Reports and related documents	Includes Driving Reports, MVR Reports
FINAN	Financial Reports and Statements and related documents	Includes Trust Agreements, Financial Questionnaires, Income Statements, Financial Reports - Personal and Business
MONEYDOC	Checks / Money Sheets and related documents	Any money documents, checks, authorizations for check withdrawal, and correspondence related to premium payment or other financial transaction, including Cash With App, Cash On Delivery checks, Voided Check Copy, Bank Correspondence, Premium Checks, EFT Forms, Remittance Sheet, Interim Money Sheet, COD Money Sheet, Returned Checks, Govt Allotment Forms, PAW Card / Voided Check Copy, PAW Correspondence
HOSMAC	HOS / SMAC Results and related documents	Electronic Receipt of Urine Blood Test
HOS	HOS Results and related documents	Paper Urine Test Results
SMAC	SMAC Results and related documents	Paper Blood Test Results
LABTICK	Lab Ticket and related documents	Lab Receipts / Urine / Blood Test documents or forms used during collection