

illumifin Text Messaging for Appointment Scheduling and Updates

Lincoln *MoneyGuard*® Interview Enhancement

The Lincoln *MoneyGuard*® team offers text messaging for interview scheduling and appointment updates with our partner illumifin. This feature will reduce manual touchpoints and increase efficiency by placing control in the hands of the client and introducing automation to the scheduling process. illumifin will offer text messaging on any type of interview, whether it be the full interview, partial interview or the cognitive screening.

For interviews conducted via illumifin

Clients will be able to schedule, reschedule, and receive reminders and updates directly from their cell phone. To utilize text messaging, the client will need to provide a valid cell phone number. This new process will replace the online scheduling tool. illumifin conducts interviews for applicants who are ages 61 and older. The types of text messages they can expect to receive are:

- Initial appointment scheduling
- Appointment confirmation
- Appointment reminder
- Appointment running late (if applicable)

The client will also be provided with a contact number if they would prefer to call illumifin regarding their interview. The client will have an opt-out option provided to them in the initial text from illumifin, and they can opt-out at any point in the process. By opting out, the client will be placed in the phone queue for illumifin to conduct future communications via phone.

We encourage you to talk with your client about this new feature before you submit the application. Since this process will be automated, illumifin will reach out very quickly once they receive the client's cell phone number. The dedicated phone number from which illumifin will be conducting reach outs will be (833) 434-0729. If the client does not respond to the text messages within three days, illumifin will reach out via phone. If contact still cannot be made after 5 days, Lincoln will be updated and in turn Lincoln will reach out to the case contact for next steps.

For interviews conducted through Lincoln Tele-App

There will not be any changes to the current scheduling process at this time. However, the client will receive text message reminders for their upcoming appointment.