# iGO Basics User Guide

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## **iGO System Requirements**

#### <u>Overview</u>

See below for our iGO certified browsers and system requirements.

**Note:** Please be advised that we have modified the format of our "System Requirements," and you may notice differences between the Classic UI and Next Gen UI System Requirements formats. Please contact iPipeline Support with any questions regarding System Requirements.

#### **Operating System Support**

If a vendor (such as Microsoft) does not support a certain operating system, we will not support it as well. iPipeline supports operating systems only up to the level that the vendor supports.

#### **Certified Browsers**

We continue to certify new versions of the most popular web browsers, including:

#### **Windows**

- Microsoft Internet Explorer v.11 & Edge
- Google Chrome, most recent stable version
- Firefox, most recent stable version

#### Mac OS & iOS

Apple Safari, most recent stable version.

#### Mobile Devices

We certify iPhone and Android for the Clickwrap e-Signature/Signing process ONLY.

\*Support for Android and iPhone may vary by Carrier as project specific changes are required to ensure proper rendering of forms, such as Illustrations and application PDF packages.

#### **Android**

Chrome, most recent stable version (Clickwrap e-Signature/Signing process ONLY).

#### **iPhone**

Safari, most recent stable version (Clickwrap e-Signature/Signing process ONLY).

**Note:** Please be aware that Microsoft's support policy for Internet Explorer browser versions has changed. Microsoft will no longer be issuing bug and security fixes for certain combinations of Operating Systems and Browsers as of January 12th, 2016 (read more about Microsoft's Policies and the discontinuation of IE 9 & 10 here) It is our policy to support Browser and Operating system combinations supported by the manufacturer, therefore while System Base Version 9.0 and the Next Gen UI were tested on IE 9 & 10, we cannot guarantee continued full support for those browser versions going forward.

#### **Browser Certifications**

What does certified mean? The iGO e-App, Illustrations and PolicyHS solutions support a variety of robust, complex features that require extensive testing and validation when new or updated technology is introduced to the marketplace. When iPipeline certifies a new browser or operating system, it means that full regression testing and defect remediation has been completed for that version. Completing this testing and validation effort ensures our customers receive the optimal user experience when leveraging the platform.

What does Non-Certified mean? iPipeline does not support operating systems or browsers outside of mainstream support. If your preferred browser and/or operating system is not contained in the list above, it means that iPipeline does not complete testing of the platform on it. Platform testing is important as it ensures our solutions work optimally and that each user enjoys the best experience possible. While iPipeline does not test and certify all available operating systems and browsers, we will strive to support a user utilizing a Non-Certified OS/Browser to the extent possible. Issues and defects reported will be triaged and resolved at the discretion of iPipeline

# How to Start a Case in the iGO e-Application

# Video Tutorial

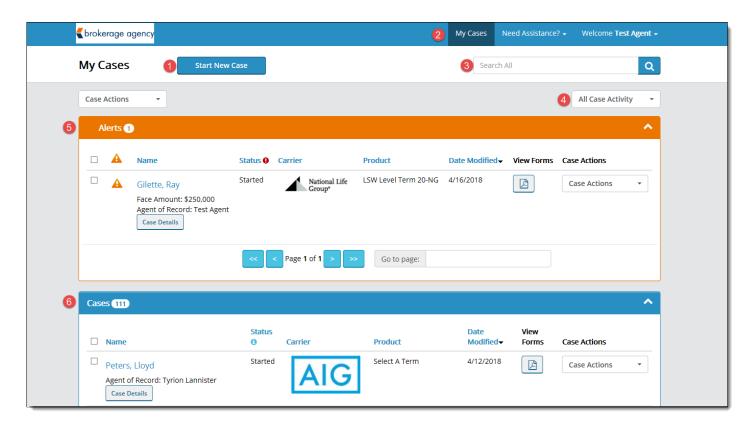


# Navigating the iGO Cases Dashboard

#### Overview

As an Agent, the My Cases dashboard is where you will begin and maintain cases for your clients. Here is a quick tour of the dashboard.

#### Navigating the iGO Dashboard



Here is a list of the different points of interest on the iGO Dashboard

- 1. Start New Case Click this button to begin a new application for your client
- 2. Toolbar This toolbar will show on every screen of the application. It includes a link back to the My Cases dashboard. The Need Assistance menu includes helpful links to our customer portal, a "Take the Tour!" video, and a link to allow you to chat with a support representative if you have questions while filling out an application. If you click on Welcome, you can update your agent profile as well as Sign Out of the software.
- 3. Search Bar This option allows you to search for specific cases in your dashboard
- 4. Case Activity This menu allows you to narrow down your dashboard view based on when the applications were last updated.
- 5. Alerts This list includes cases that need to be addressed. Typically, they are awaiting the signature of one or more signing party.
- 6. Cases This is your general case list. This can include started and completed cases that are not awaiting any action.

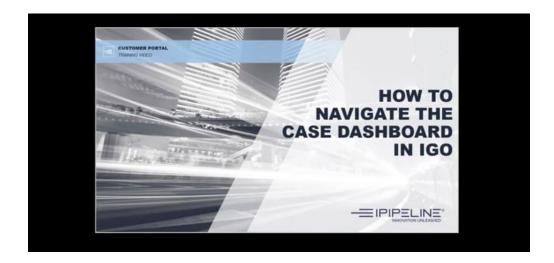
#### Navigating an iGO Case

Let's take a close look at a case in the dashboard.



- 1. Customer Name
- 2. Case Status If you are unsure what a status means, click on the "I" next to the word Status. You will be provided with a legend of all status and their meaning.
- 3. Carrier Logo
- 4. Product Selected
- 5. Date Modified
- 6. View Forms Click on this button to get a PDF copy of the application. If you have entered any information into the application, it will show when you view the PDF. After the application is signed and submitted, you can also return to your dashboard and retrieve a complete copy of the application with the signatures.
- 7. Case Actions Drop-Down Menu This is the list of possible actions that can be taken on this case. Some examples actions include Open Case, Delete Case, Duplicate Case, and even e-Sign.
- 8. Please note these actions may differ depending where you access the iGO software, either through an agency or carrier
- 9. Case Details
  - a. From the Case Details screen, you can see more detailed information regarding the case, an
    activity history of all actions taken, and can resend e-signature emails to any signing party
    (insured, owner, agent, etc.)
  - b. You will also be able to update the email address and resend the e-signature email for any signing party.

#### Video Tutorial



# Checking the Status of an iGO e-Application

#### **Overview**

From the Case Dashboard, you can check on the status of all your pending cases.

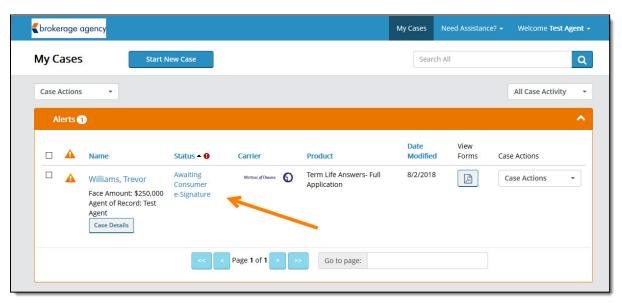
## Checking Case Status

1. You will first need to return to the iGO e-application software. This is where you initially filled out the application and sent it to the client for signature. You will know you are in iGO when you see the screen below. Click View My Cases.

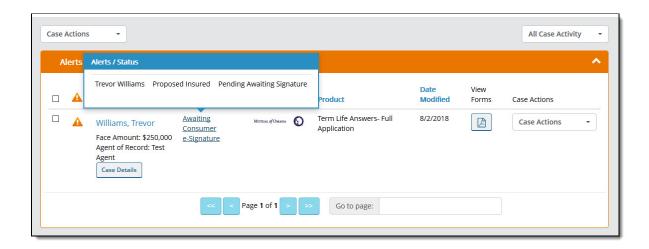


**Note:** If you are unsure how to return to iGO, contact the agency or carrier you write your business through. They will be able to help you navigate their company website and get you back to iGO.

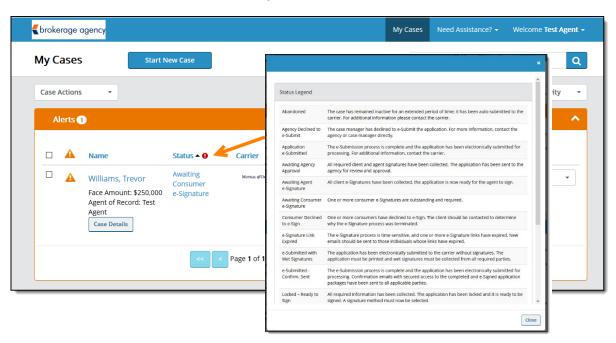
2. This will bring you to the My Cases Dashboard. (shown below). You will see, to the right of the client name, the status of the application.



3. This application shows that it is **Awaiting Consumer e-Signature**. If you see a status that is unclear, like **Pending**, you can click on the status for more details.



4. For more information regarding the statuses within iGO, click on the "!" icon next to the word **Status**. This will provide a list of all statuses and their meanings.



**Note:** If an application is in the **Complete** status, that means it has been submitted to the carrier. At this point, you will need to reach out to the carrier directly for more information about the status.

#### Video Tutorial



# What to Expect with iGO e-Signature

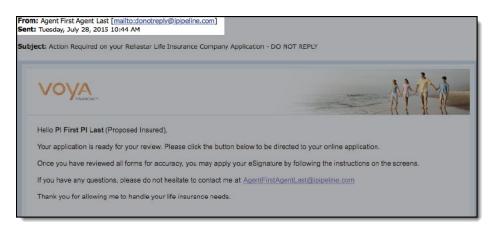
#### **Overview**

Below is a breakdown of what your clients should expect from the e-Signature process, including who the email will come from, what the subject of the email will be, and what is in the body of the email.

#### Who the Email is From

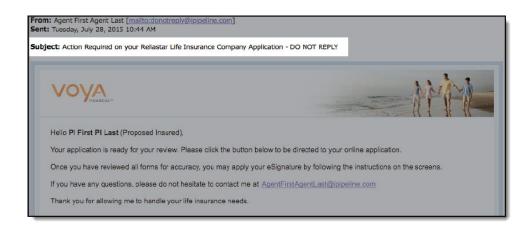
The email will be from the agent.

**Note:** This email is **not** connected with the agent's email provider. It will simply state the agent's name.



#### The Subject of the Email

The subject may vary slightly by carrier but will always contain a call to action with the name of the carrier.

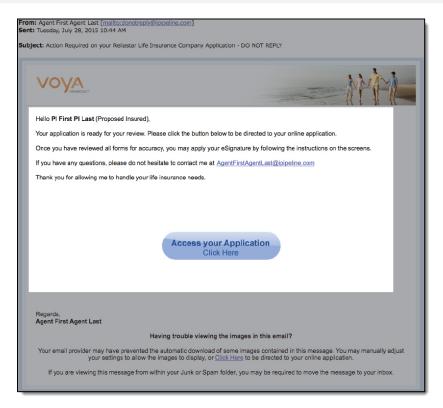


The Body of the Email

The body of the email contains the following:

- 1. A message with instructions (which **cannot** be altered by the agent). Some carriers grant agents the ability to add a customized message in addition to the standardized instructions.
- 2. A direct link to e-Sign the application, as shown by the "Access your Application" button in the screenshot below). Please note that this link will direct the client to a login/verification screen. Most carriers require the last 4 digits of the client's SSN.
- 3. A direct link to the agent's email.

**Note:** Please **do not** have your clients reply directly to this email. It **does not** have the ability to receive communications.



# Logging Into the iGO e-Signature Process

#### **Overview**

You can log into the e-signature process by following the directions below for each user type.

**Note:** Not sure which PIN to use? Click here for instructions to locate the PIN in the iGO e-App.

### Consumer Login

Once you have completed your application and/or forms by providing your Agent with the required information, you are eligible to sign your documents and submit them electronically. If you are having difficulty logging into the e-Sign process it might be helpful to know the following:

- Typically, Consumers are asked to log in to e-Sign using the last four digits of his or her SSN. If you have tried to input your SSN, it is possible your SSN was entered incorrectly on the application. It is advised that you contact your Agent and confirm that your SSN was captured correctly.
- Occasionally, a unique PIN may be created for you, by you or your Agent at the time the application or forms were completed. Contact your agent to determine if there is a unique PIN you should be using.
- Sometimes, additional data such as your date of birth of the amount of insurance applied for is also required. If required, confirm with your Agent the information you should be entering.
- Are you signing on behalf of a business or trust? If so, you may be required to enter the last four digits of the Tax ID Number (TIN).
- Locked out? To ensure your personal information is kept secure, the system will temporarily lock you out of the process if you fail to authenticate too many times. If this happens, please contact your Agent to send you a new, secure link via email. You should also confirm your access information at this time. Alternatively, you may use the Chat feature located on this page to instant message with a Support Representative who will be able to assist you.

#### Agent/Producer Login

Once your client(s) have completed e-Signing, your e-Signature is required. If you are having difficulty logging into the e-Sign process it might be helpful to know the following:

- Typically, Agents are asked to create a unique PIN after "Locking" the application, I.E. during the e-Signature set up process. You may navigate back to your iGO e-App dashboard, open the desired case, and navigate to the e-Signature set up screens to view your PIN. NOTE: Do not "Unlock" the application. This will remove all e-Signatures previously captured.
- Less typical, the Agent is required to enter his or her SSN. You will be able to see this within the e-Signature set up screens as well.
- Sometimes, additional data such as your date of birth of the amount of insurance applied for is also required.
- Locked out? To ensure yours and your clients' personal information is kept secure, the system will temporarily lock you out of the process if you fail to authenticate too many times. If this happens, you may log into iGO e-App and resend a new email via the My Cases Dashboard (via the Case Actions Drop Down). Alternatively, you may use the Chat feature located on this page to instant message with a Support Representative who will be able to assist you.

#### Case Manager/Submission Approver Login

An Agent has just completed an iGO e-App via your web portal. The App has been sent to you to review and approve. If you are having difficulty logging into the e-Sign process it might be helpful to know the following:

- When your Agency was set up with iGO, your Agency Account Admin provided iPipeline with set up information. Included in this information was a default PIN to be used to access, view and approve iGO e-Apps. Please consult with your Agency Admin to determine the information you should be entering.
- It is possible that your Agency manages PIN's on an individual level. This is completed within the iService Admin Site and can be located under the "iGO Configuration" section.
- For additional help, feel free to access the Chat feature located on this page. You may instant message directly with iPipeline Support Personnel who will be able to assist you.

# **Electronically Signing an Application**

#### Overview

In iGO, you can easily sign an application electronically by email. This can be useful when you are working with clients in different states or areas too far to travel.

## Electronically Sign an Application

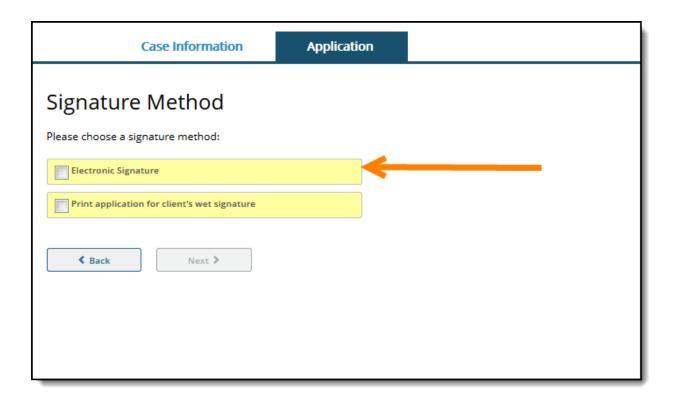
The most popular signature method is electronically signing through email. Follow the steps below to submit an application using the e-mail e-signature method.

### e-Signing an Application through e-Mail

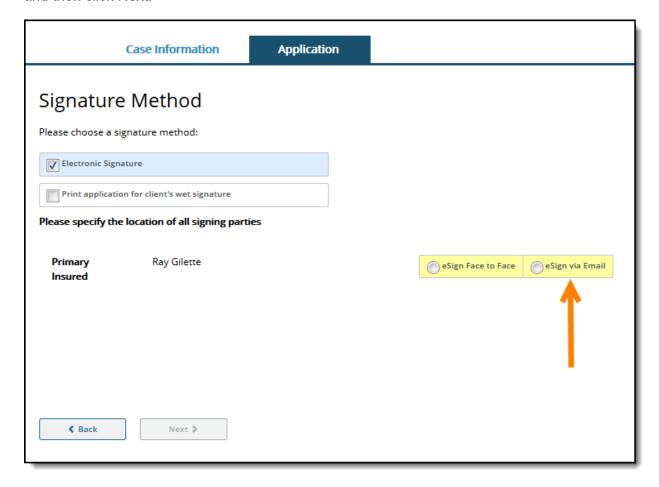
After you lock the application, you will now be asked to select a signature method. If you are not able to meet with your client or if they live in a different location entirely, you will want to select the e-Sign via Email option. This allows you to send an e-mail notification to your client to allow them to sign whenever is convenient for them.

**Note:** There may be slight differences in the email signature process from carrier to carrier.

1. Once the application is locked, click the next button and you will be asked to select your signature method. You will select Electronic Signature.

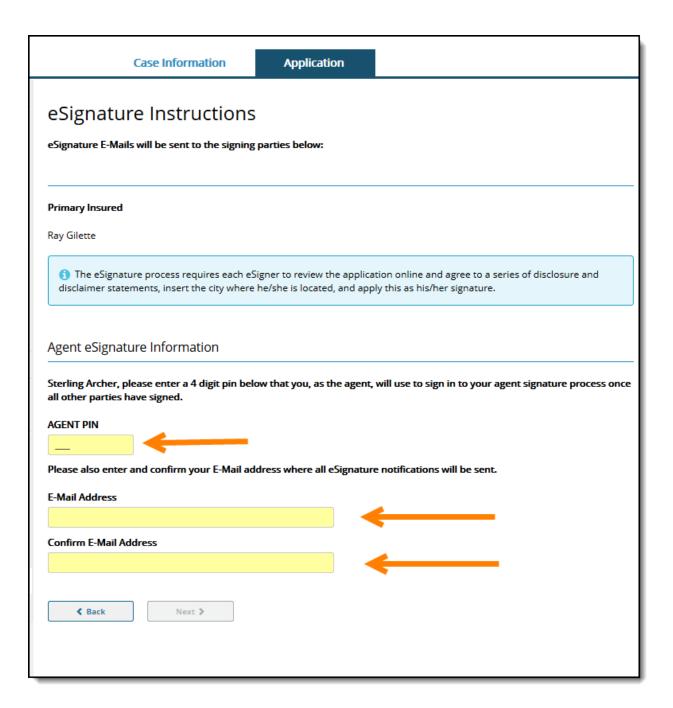


2. Next you will be given the choice to e-Sign Face to Face or e-Sign via Email. Select e-Sign via Email and then click Next.



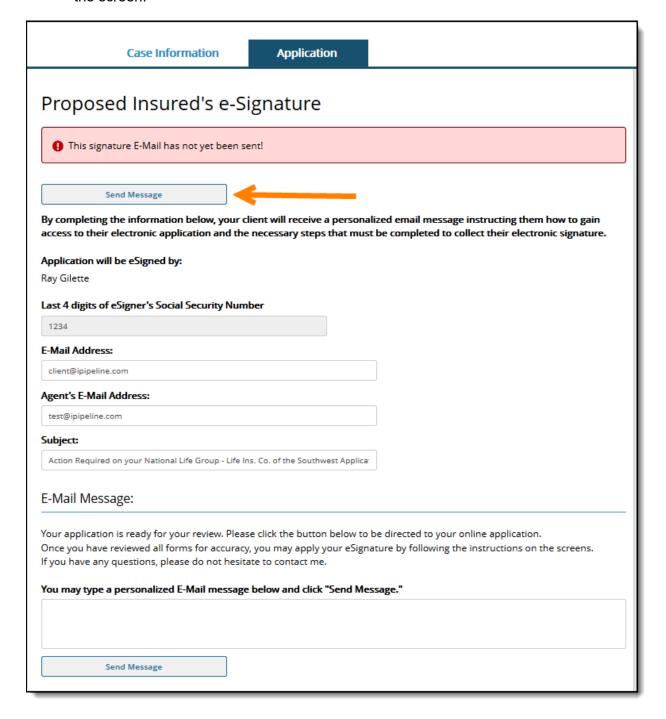
3. On the e-Signature Instructions section, it asks you to enter an agent PIN. This will be used by you, the agent, to log in and sign the application after the client has signed. You will also be asked to enter your and confirm your email address. Once the information is entered, click Next.

**Note:** Some Carriers do not give you the opportunity to enter a PIN but will default your PIN to the last four digits of your SSN.



4. After you have reviewed the information on the page below, you are able to send the e-Signature notification to your client by clicking the Send Message button.

• You can also add a personal message or instructions for you client in the box at the bottom of the screen.



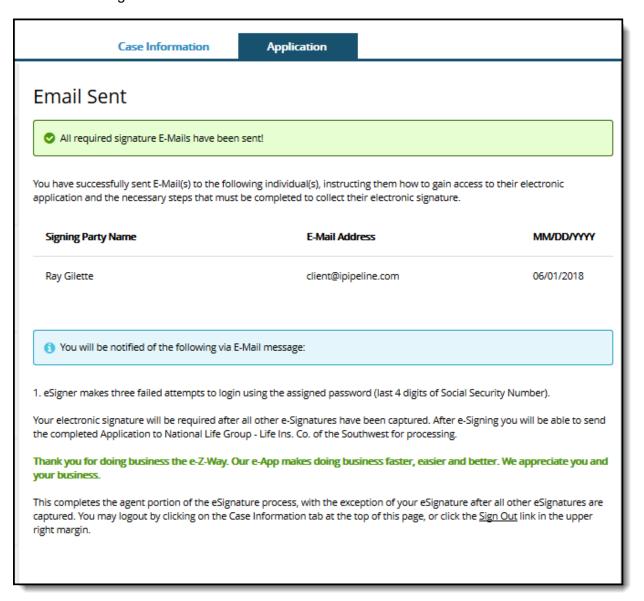
5. Once you click the Send Message button, the page will refresh and the alert at the top will change to alert you that the email has been sent. Also, the Send Message button will change to a Resend Message. Click the Next button.

Resend Message

Next >

**◆** Back

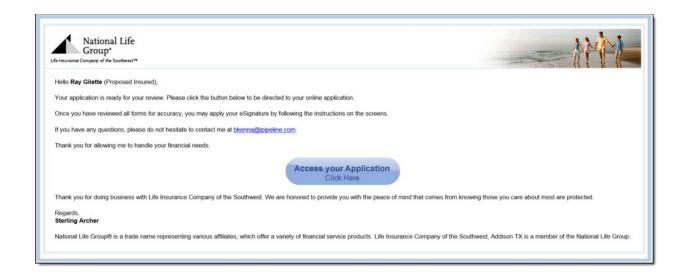
6. This last page is a confirmation that all emails have been sent and there is nothing left for you to do until the client signs.



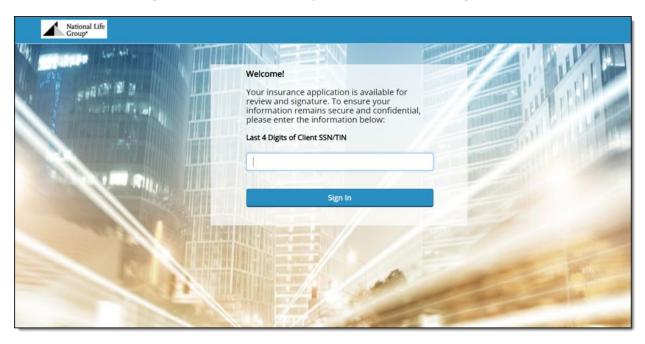
#### Consumer e-Signature

Here are the steps the client takes to electronically sign once they received the e-Signature email.

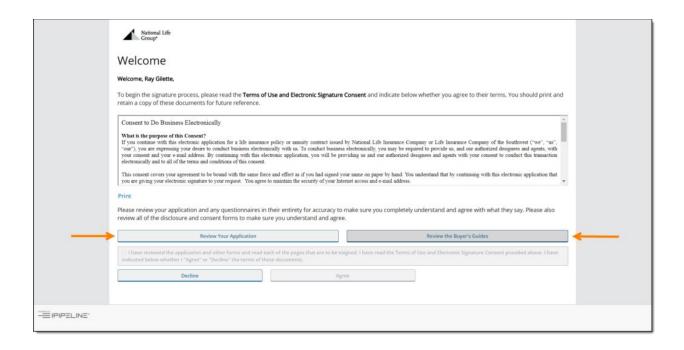
1. The client will receive an email notification letting them know the application is ready for their review and signature. Below is an example of the email they will receive.



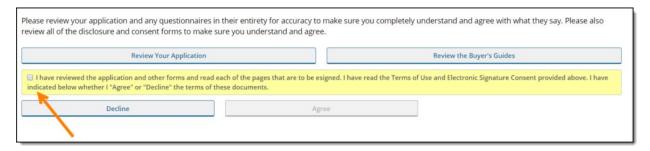
2. Once the client clicks on the Access your Application, they are brought to a screen to login. The client enters the last four digits of their social security number then clicks Sign In.



3. On the Welcome screen, the client is asked to read the consent and terms. Before they can move forward, they are required to review the application and buyer's guide by clicking on the respective buttons.



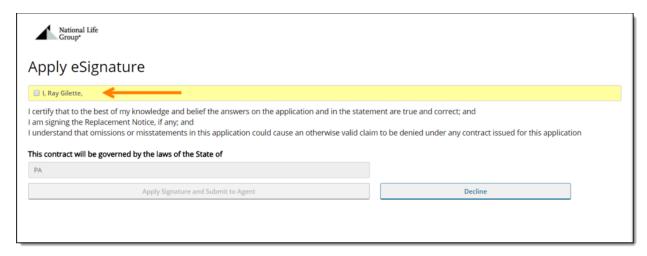
4. After both documents are opened and reviewed, the client clicks the check box beneath the buttons to acknowledge that all documents have been reviewed.

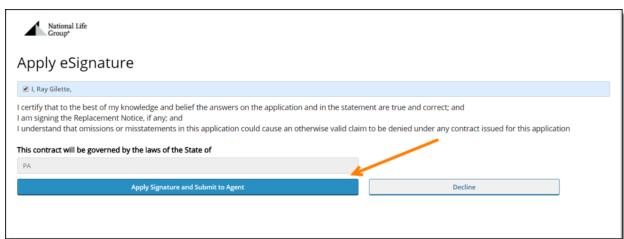


5. By clicking the check box, it will activate the Agree button. Click on the Agree button to move forward.

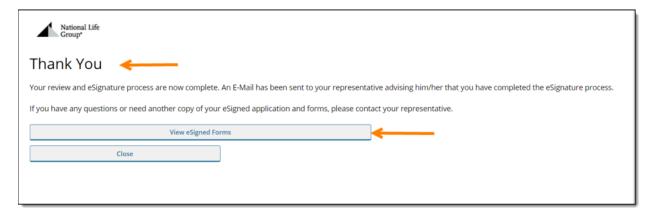


6. On the next screen, click the box next to the client name to activate the Apply Signature and Submit to Agent button. Click the Apply Signature and Submit to Agent button to finish the process.





7. The client will know the process was complete and successful because they are brought to a final Thank You page. From this page the client is also able to print out a copy of the application.

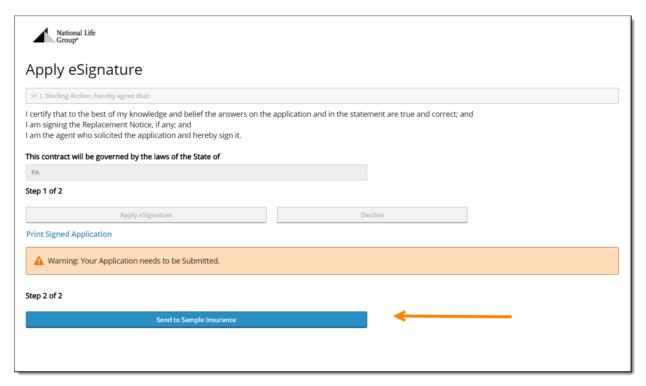


## Agent e-Signature

Once the client clicks the button, an email notification is sent to the agent to allow them to sign the application.

The e-Signature process is the same for the agent except for the final screen.

For the Agent, after the Apply Signature button is clicked, you will be asked to Submit or Send the application.



If this button is not clicked the application will not be electronically transmitted to either the carrier or agency.

**Note:** Depending on where the application was started, the application with either transmit to an agency for approval or will transmit directly to the carrier.

Congratulations, you have successfully signed and submitted an application using the Email e-signature method.

#### Video Tutorial



# e-Signing an Application when Face-to-Face

## **Overview**

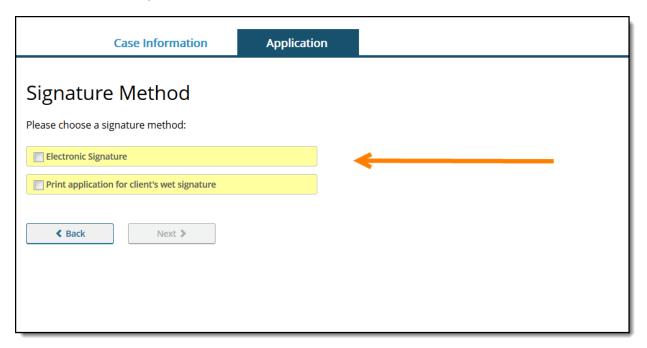
Within iGO, you can choose to electronically sign an application while face-to-face with a client. Follow the steps below to submit an application using the face-to-face e-signature method.

## e-Signing an Application when Face-to-Face with a Client

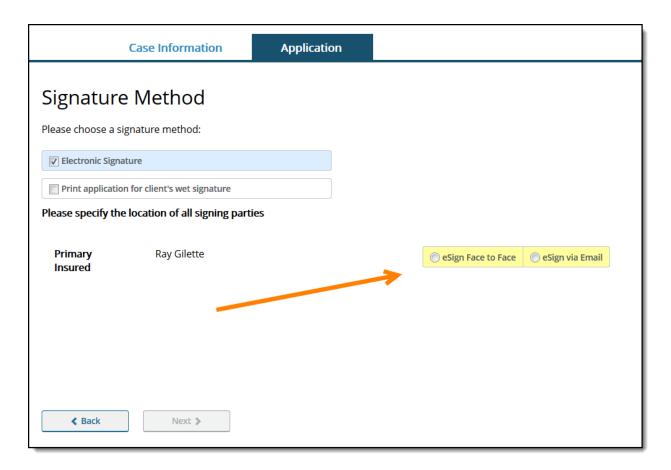
After you have locked the application, you will now move into the Signature section. Along with e-mail signature and print and wet sign, most carriers offer the Face-to-Face signature option. This allows you to collect the signatures electronically while sitting with your client.

Please note the screens may differ between carriers and some carriers do not offer the Face-to-Face signature method.

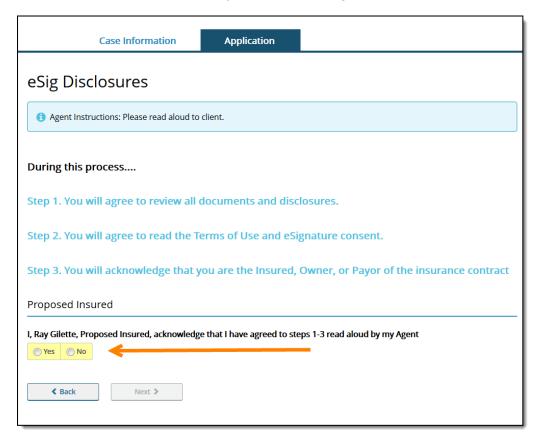
1. Once the application is locked, click the next button and you will be asked to select your signature method. You will select Electronic Signature.



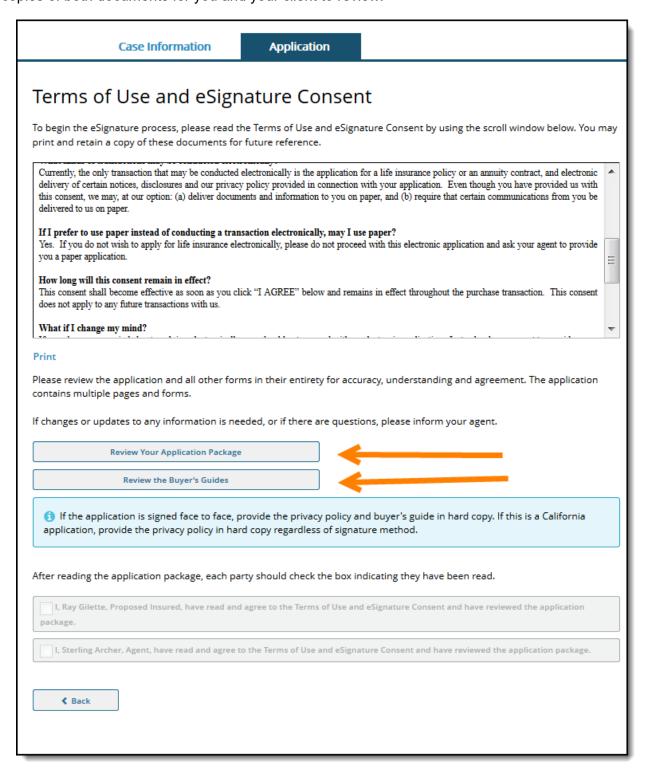
2. Next you will be given the choice to eSign via Face to Face or eSign via Email. Select eSign Face to Face and then click Next.



3. Most carriers will have certain disclosures for you to acknowledge. Click Yes and then Next.

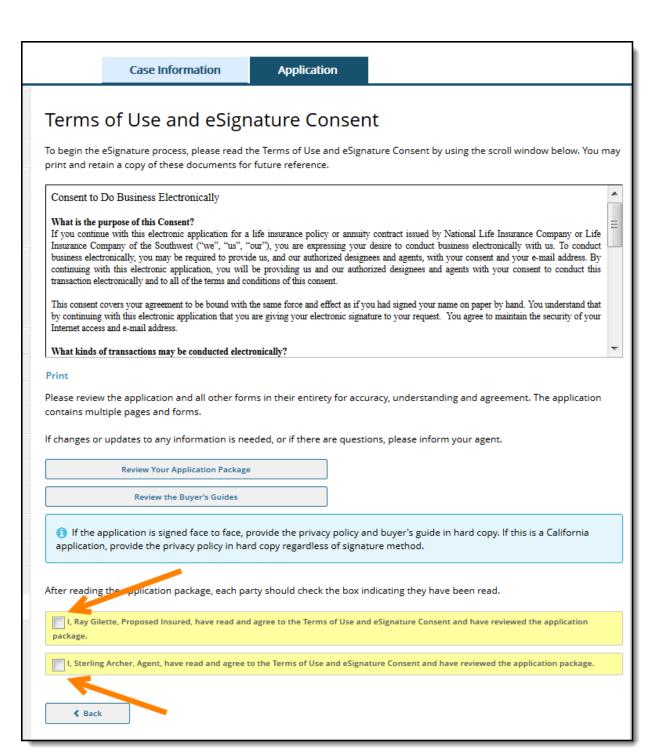


- 4. Review the Terms of Use with your client.
- 5. Click the Review Your Application Package and the Review the Buyer's Guides buttons. This will bring up PDF copies of both documents for you and your client to review.

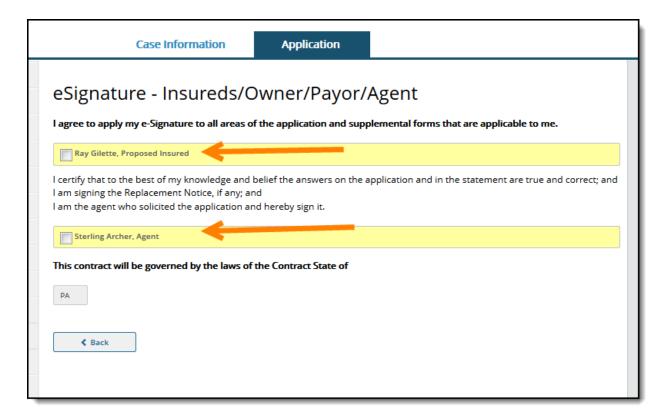


Note: If the forms do not populate, make sure your browser's pop-up blocker is deactivated.

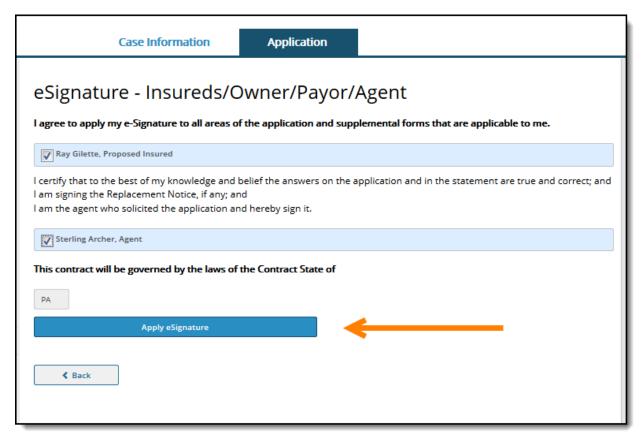
6. Once both documents are reviewed, click the corresponding check box to acknowledge that both parties have reviewed the application and other forms. Then click Next



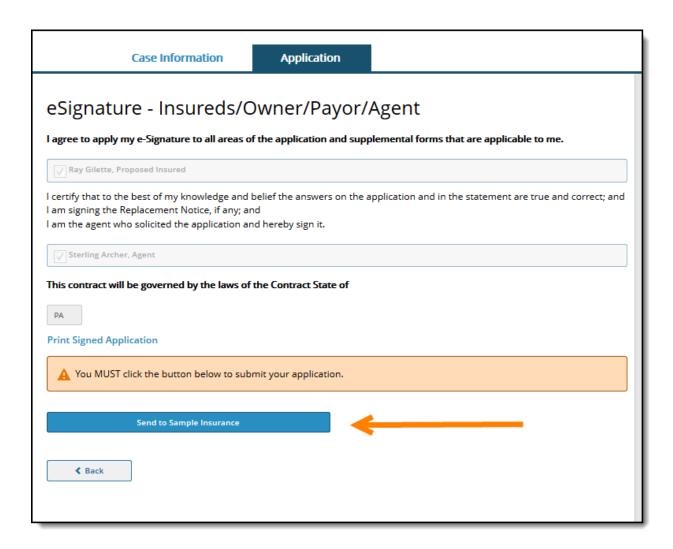
7. Click the corresponding check box (proposed insured or agent) to agree to apply the e-signature.



8. This will activate the Apply eSignature button.



9. Finally click the Submit/Send to button.



Congratulations, you have signed and submitted an application using the Face-to-Face e-signature method.

#### Video Tutorial



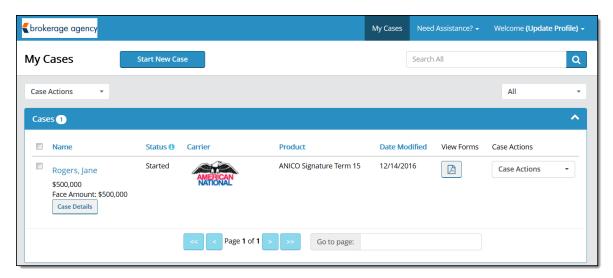
# How to Resend e-Signature Emails

#### Overview

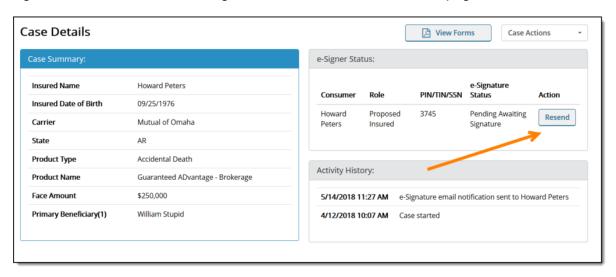
There may be a case where you wish to resend an e-Signature email. You can easily do so with the e-Signature resend tool on the **Case Details** page in iGO.

## Resend e-Signature Email

1. Log into your iGO e-App account and navigate to the My Cases screen.



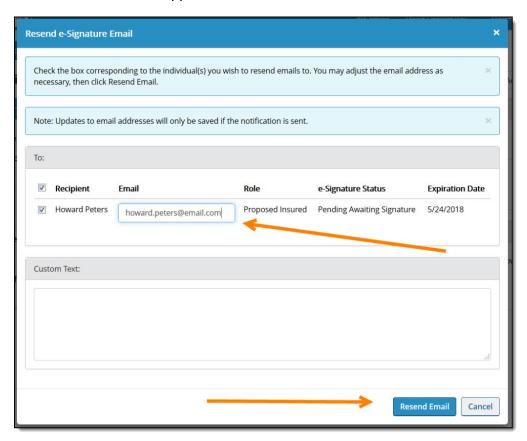
- 2. Locate the case for the desired client.
- 3. Click the **Case Details** button that corresponds to the desired case.
- 4. The e-Signature resend tool is on the right-hand side of the **Case Details** page.



#### 5. Click Resend.

Any client eligible to receive an email displays a **Resend** button. A pop-up window displays with the client name and email address.

6. Edit the email address at this time, if applicable.



#### 7. Click Resend Email.

An email containing a new e-Signature link is sent to the selected recipient.

**Note:** All previously sent emails and links are deactivated. Please be sure to check all junk and spam folders frequently throughout the e-Signature process.

# Video Tutorial



# Locate the PIN in iGO

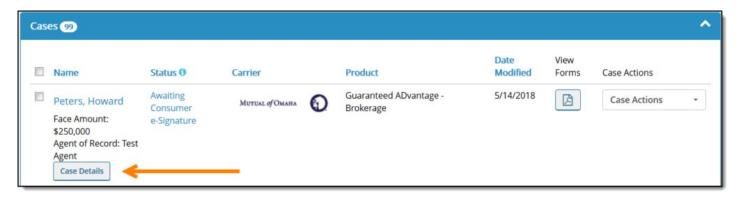
#### Overview

To sign an application electronically by email, each signing party requires a PIN to log in. Review the steps below to locate the required PIN in the iGO software if you are unsure which PIN to use.

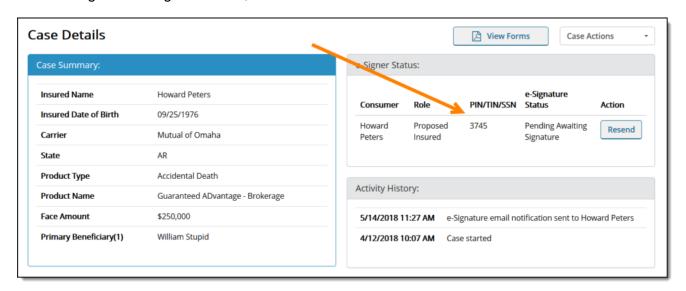
### Locate the PIN within iGO

Unsure of your PIN or the PIN of the client? As the agent you can look up the PIN for each signing party.

- Start by logging into your My Cases dashboard from where you started the application.
- Click the Case Details button beneath the client's name.



- On the right-hand side of the page, there is a section called e-Signer Status.
- To the right of the signer's name, it will list their PIN.



Note: This includes PINs for all parties except the Case Manager/Submission Approver.