POLICY eDELIVERY OPTION EXPANSION

FREQUENTLY ASKED QUESTIONS

Effective April 24th, 2021 we will be expanding our eDelivery option on the *Trendsetter Super* and *Trendsetter LB* products for both eApp and paper application submissions.

There are no risk class or rider limits for the policy eDelivery option. The agent email provided for eDelivery reference will be notified when the client is notified of eDelivery and they will be able to view the case status on the agent web portals. Policies that have been eDelivered are available to view and download via DocFast once a login credentials have been created.

THE eDELIVERY OPTION IS NOT AVAILABLE ON THE FOLLOWING:

- New York, Guam, Puerto Rico, or Virgin Islands*
  NOTE: Not available in Maryland when policy is approved less than applied with sub-standard risk class
- Insured or owner is not a U.S. resident or U.S. citizen
- Insured is a juvenile
- Organizations, trusts, or multiple owners
- Owner/insured email address and/or SSN missing

- Payor is other than insured or owner and the EFT delivery requirement is present
- Illustrations signed on delivery
- Policy reissues
- Any pre-issue requirements that are granted an exception to obtain on delivery

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Q. How can the agent Opt IN for eDelivery for paper applications?

A. They will need to fill out and have the client sign two new forms, the eConsent 2017 and eDelivery Terms and Conditions.
NOTE: Georgia and Utah do not require the eDelivery Terms and Conditions form.

Q. What if agent and/or client wants to Opt OUT of eDelivery?

A. For paper applications, do not submit either of the forms mentioned above. This will opt the client out of eDelivery.

Q. How can the agent confirm what method my case is set to deliver?

A. The agent can review the forms submitted, check the agent web portals, or ask New Business.

Q. My client added the wrong email. How can this be changed?

A. We are only able to send the policy to the email that the client provided at the time of application submission since the signed form is tied to the email initially provided. If the correct email is misspelled, it can be corrected and resent. Please contact your Agent Tech Support for further assistance.

Q. My client received their policy eDelivered but cannot locate it. What should they do?

A. The original email link can be resent from the agent email that was copied and provided for eDelivery reference. If they are still unable to locate it, have them check their spam email folder.

Q. How long does my client have to sign their documents once emailed?

A. The link will be available for 15 days once the initial email has been sent. Email reminders are sent every seven days.
NOTE: If the client does not sign the required documents within 15 days, the case and every delivery requirement will be mailed to the client.

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Q. How can agents view the policies being sent to their clients?

A. They are set up to be copied on the email being sent to the client. They will also be able to see all policies that they were copied on within the Dashboard.

Q. Will agents be able to download a PDF of the case for their records?

A. Yes, a PDF of the case will be available to download for 30 days. Agents can download a PDF for their records, however if the case is still in process it will have a watermark and Transamerica will not accept signed documents with the watermark.

Q. My PDF has a watermark. How do I download one without this mark?

A. The client needs to either complete signing the forms, or you will need to print and hand deliver. **NOTE:** If you print and hand deliver this will deactivate the link provided in the initial email notification.

Q. What happens if the client decides they don't want to review the policy in email?

A. The case can be changed to "hand" deliver in DocFast to make PDF downloadable without the watermark. **NOTE:** Again, once this is done it will deactivate the link.

Q. Who should the agent contact if they are having issues with DocFast or if I get locked out?

A. Contact your Agent Tech Support to discuss the issue. If they are unable to resolve, a ticket will be submitted.

Q. How do you access DocFast for the first time?

A. Once you click on the link within the first eDelivery email you will be directed to the registration page to create a login and password.

Q. How can agents access DocFast other than receiving an email with a link?

A. The following link will be available for them to enter their login credentials: **policyexpartnerportal.ipipeline.com**

Q. What happens if the client wants to Opt IN after the application has been submitted?

A. They can submit the eConsent 2017 and eDelivery Terms and Conditions forms signed. **NOTE:** Clients can Opt OUT within the eDelivery process or after issue.

Q. Does this new process support the pending new business requirements?

A. No, eDelivery via DocFast supports eSignature of delivery requirements at this time. eSignature for Brokerage remains the same process as it has been.

Q. If the client receives an eDelivered policy, however wants to eSign outside of DocFast platform, is that allowed?

A. Yes, if the GA is approved for eSignature. If they are not, they cannot eSign Delivery Requirements outside of DocFast.

Q. What happens if the client Opts IN but the case gets issued before the forms were signed?

A. The required forms are delivery requirements for the case to be placed in force. **NOTE:** The agent does not need to sign any forms in DocFast for the policy to place.

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