

DocFast Agent Quick Reference Guide



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Introduction

IPipeline's DocFast™ is a highly customizable hosted software product that is designed for e-document delivery, including insurance policies and other documents that require certified execution and are typically mailed via postage today. DocFast includes:

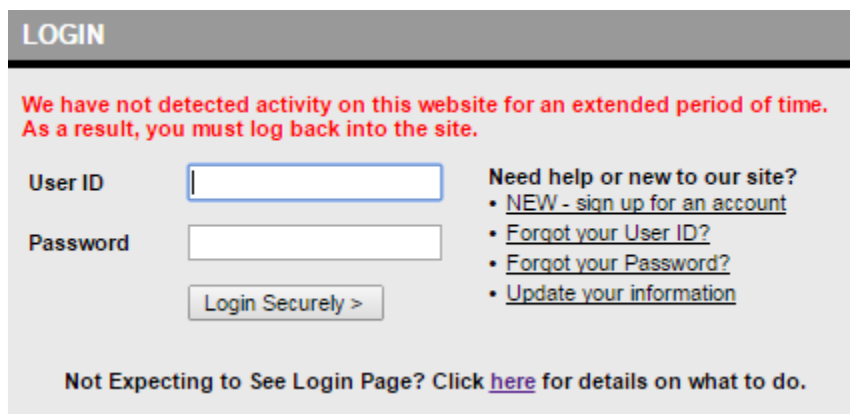
- **E-Signature** – e-signature and integration with your preferred e-signature vendor.
- **Compliance Audit** – Full audit of the delivery and signing ceremony.
- **Delivery Flexibility** – A powerful rules engine that provides for variations in delivery routing by distributor channel, producer, line of business, etc.

About This Document

This document provides documentation for policy review and approval by the Agent within DocFast.

DocFast Log In/ RSA

Using the web address bar, enter <https://policyexpertportal.ipipeline.com> and login with your email address and password. Upon successful validation of the credentials, the system will display the Dashboard associated with the login.



LOGIN

We have not detected activity on this website for an extended period of time. As a result, you must log back into the site.

User ID

Password

Need help or new to our site?

- [NEW - sign up for an account](#)
- [Forgot your User ID?](#)
- [Forgot your Password?](#)
- [Update your information](#)

Not Expecting to See Login Page? Click [here](#) for details on what to do.

Dashboard

1 Alerts (2) Hide
2 Status
3 Documents
4 Actions

Status	Delivery Expiration Date	Carrier	Case Manager	Consumer	Identification Number	Documents	Actions
Sent to Agent 0 of 2 signatures, 0 issues	1/31/2015	Genworth Financial	Killebrew, Matt DCMA	Jetson, George	GJ0116201 5		Actions
Sent to Consumer 1 of 2 signatures, 0 issues	1/31/2015	MassMutual FINANCIAL GROUP	Killebrew, Matt DCMA	Jetson, George	GJ1152015 4		Actions

Latest Activity	Status	Delivery Expiration Date	Carrier	Case Manager	Consumer	Identification Number	Documents	Actions
1/16/2015	Declined Offer by Distributor (NTO) 0 of 2 signatures, 0 issues	12/31/2014	Genworth Financial	Killebrew, Matt DCMA	Jetson, George	GJ1215201 4		Actions
1/15/2015	Delivery Requirements Received 2 of 2 signatures, 0 issues	1/31/2015	Genworth Financial	Killebrew, Matt DCMA	Jetson, George	GJ1162015 4		Actions
1/15/2015	Delivery Requirements Received 2 of 2 signatures, 0 issues	1/31/2015	Genworth Financial	Killebrew, Matt DCMA	Jetson, George	GJ1152015 4		Actions




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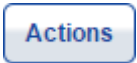









- 1 Alerts Pane** - The Alerts Pane indicates how many documents require your immediate attention
- 2 Workflow/ Status** - Indicates the parties involved in the signing process as well as the specifics of who has done what. The color of the avatars indicate
- 3 Documents** - Clicking the PDF icon allows you to view the Document Package within DocFast

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Actions - Opens the Actions Menu and allows you to either e-Sign and Deliver the Document to the Consumer, issue a Change Request, Decline the Offer, Request an Extension or Print and Hand Deliver the Document (see *Table 1*)

Dashboard Navigation and Icon Glossary

UI Element	Definition/ Function
Log Out	Used to log out of the system user Interface
Help	Access the DocFast Training environment for written documentation and video tutorials
<input type="text" value="Last 90 Days"/>	Dropdown to re-filter Document Package to reflect ALL Document Packages or those packages entered in the last 1, 7, 30, 60 and 90 Days
<i>Search by identification Number or Consumer name X</i>	Search pane to lookup Document Packages by Identification Number or Consumer Name
	Search icon used to execute document search
Alerts (4)	Indicates the number of Document Packages currently requiring attention
	Hover over to display pending Alerts/ Action items behind corresponding Document Package
Status	Displays the current Status of the Document Package within the given workflow
	Clicking the Information icon displays the glossary of terms behind the various DocFast workflow avatars
Delivery Expiration Date	Displays the scheduled expiration date behind the Document Package
Product Type	Defines the type of document being sent through DocFast
Carrier	Defines the Carrier or Vendor supplying the Document Package to the consumer
Case Manager	Defines the Distributor Case Manager responsible for approving the Document Package

UI Element	Definition/ Function
<u>Agent</u>	Defines the Agent responsible for approving the Document Package
<u>Identification Number</u>	Displays the Document ID Number/ Policy Number behind the Document Package
<u>Documents</u> 	Clicking the PDF icon will load the entirety of the Document Package within the DocFast User Interface for closer review
<u>Actions</u> 	Clicking the Actions button displays the available actions that can be taken against the Document Package
	Displays the current workflow status from Carrier > Distributor > Agent > Consumer
	The document has been approved and sent to the next approver in the workflow.
	The document requires your approval before delivery to the next approver. You may also need to e-sign the document.
	The document is currently being approved by this person before being sent to the next approver.
	This document has been canceled by this person for changes required, declined offer, or refusal to e-sign.
	This document requires your attention. It has a change request or it has been canceled, and you must take action on it.
	This document has a change request or has been canceled. This person is currently reviewing the document before taking action on it.
	The document has not yet been delivered to or viewed by this person.
	This person has printed the document for wet signing. The document will no longer be in the PolicyEX delivery process.





UI Element	Definition/ Function
	This document has been canceled by the carrier. It will no longer be in the PolicyEX delivery process.
	This person has been "carbon copied" on this document; they do not need to approve it.
	The document has been delivered to the next approver. The next approver's icon is colored grey until they view the document.
	The document was viewed by an approver who found something wrong with it. The document has been sent back for review.

Table 1

Session Timeout

DocFast is designed to automatically timeout after a period of 20 minutes of inactivity. After 20 minute