

# DocFast® eDelivery

A faster, more seamless way to deliver policies to your customers and complete your cases



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#### 

### About DocFast® eDelivery

DocFast<sup>®</sup> eDelivery is an electronic policy delivery solution from iPipeline that is designed for the insurance industry, with customized features for the AIG Life business. With robust functions for financial professionals, and easy-to-use navigation for clients, DocFast eDelivery provides a streamlined solution designed to activate and deliver policies faster than paper delivery while minimizing errors and delays.

#### **DocFast benefits and features**

- Supports roles for both Insured and Owner
- Multiple workflow options:
  - DTC: Direct to Consumer
  - > CAC: Carrier (AIG) to Agent to Consumer
  - > CDAC: Carrier (AIG) to Distributor to Agent to Consumer
- · Ability to pay initial premium and set up ongoing premium payments
- Detailed delivery status available on Connext and in Pending feeds
- Digital eSignature via click-to-sign and touchscreen-signature capability
- · Works with multiple browsers and touchscreen devices, including smartphones and tablets
- Resend emails and links
- Proactive notifications allow quick response to status changes, expiring links and other issues
- Supports Good Health Statement, Bank Draft forms, Policy Acceptance and Amendment of Application
- · Eliminates need for Delivery Receipt requirement for States / Foreign Nationals

#### Look for more products, functions and enhancements as DocFast is rolled out to the AIG Life business!

#### **Supported Products**

- Select-A-Term
- QoL Flex Term
- More products coming soon!

### Accessing DocFast

You have several options for accessing DocFast, depending on your agency's existing relationship with iPipeline.

#### **USING CURRENT AGENCY METHOD**

If your agency is already using DocFast , or uses another iPipeline product (iGO full e-app, Agency Integrator, etc.), you can access DocFast by either:

- Using your agency's usual DocFast entry method, or
- Clicking the policy link in a DocFast email

Note: Depending on your agency's relationship with iPipeline, you may be asked to complete a one-time DocFast registration setup when using DocFast for the first time.

#### USING YOUR CONNEXT SIGN-IN

If your agency does NOT have an existing relationship with iPipeline, you can still take advantage of eDelivery through DocFast if you are registered in our producer portal at <u>aig.com/Connext</u>.

Simply use your Connext log-in info (user name and password) when clicking the policy link in a DocFast email.

Note: If you are not currently registered with Connext, click the "Register for a new account" option at the <u>Connext log-in screen</u> to complete the simple one-time registration process.

#### NO CONNEXT OR AGENCY ACCESS?

If your agency does not have an iPipeline tool and you are unable to register in Connext, discuss with your Case Relationship Manager. We will work with you to assist setting up a DocFast registration to suit your needs.

### Statuses (Connext or Pending Feed)

DocFast eDelivery provides meaningful status updates throughout the workflow. There are two ways to view the status of a DocFast delivery:

- Login to Connext at <u>aig.com/Connext</u> and navigate to policy details
- Login through an agency's chosen portal (i.e., SmartOffice, Agency Integrator, Custom Agent portal)

Below are possible statuses that may be seen in a feed and what they mean.

Note: Existing payment and system-generated statuses will remain unchanged.

Status	Definition
Agent notified consumer declined to sign	Agent notified that customer declined to sign and opted out of the eDelivery process
Emailed Sent to Policy Owner	The email notice was sent to the Policy Owner to complete the eDelivery requirements
Emailed Sent to Proposed Insured	The email notice was sent to the Proposed Insured to complete the eDelivery requirements
eSignature Pending Policy Owner	Policy Owner has not yet signed and completed the eDelivery requirements
eSignature Pending Proposed Insured	Proposed Insured has not completed signing and the eDelivery requirements
eSignature Complete	The eDelivery process has been completed
eSignature Declined by Policy Owner	Policy Owner declined to sign and complete the eDelivery requirements
eSignature Declined by Proposed Insured	Proposed Insured declined to sign and complete the eDelivery requirements
eSignature Request Expired	The eDelivery process has expired
Not Taken	Policy was changed to NOT Taken by Home Office
Not Taken Agent	Policy was changed to NOT Taken by Agent
Not Taken BGA/Agency	Policy was changed to NOT Taken by BGA/Agency
Paper Mailing Printed	AIG will mail and deliver the Paper Policy – the case is no longer on eDelivery
Paper Mailing Requested	Request Paper Policy – the case is no longer on eDelivery (Connext)
Paper Mailing Requested Doc Fast	Request Paper Policy – the case is no longer on eDelivery (DocFast)
Policy Information Emailed To Agent	The email notice was sent to the Agent for review and delivery to consumer
Policy Information Emailed BGA/Agency	The email notice was sent to the Distributor (BGA) for review and delivery to Agent/Customer
Reissue/Change Requested by Agent	Reissue and or Change Request by Agent
Reissue/Change Requested by BGA/Agency	Reissue and or Change Request by BGA/Agency
Use eSignature Decline Statuses	Customer declines to sign and opts out of the eDelivery process

### I'm in DocFast. What will I see first?

Where you land in DocFast depends on the login method.

#### THROUGH EMAILED LINK

When clicking the link on an emailed notification, users will be taken to a policy's **Document Details** screen. Go to <u>page 13</u> for next steps after landing in Document Details.



#### THROUGH AGENCY LOGIN

When logging in through an agency website or a saved bookmark using agency access, users will land on the DocFast dashboard.

Note: Dashboard access is not yet available through Connext.

AIG	GENT DOC	Fast Center		My Dashboard			Welcome Vanessa Agent -
<b>Filte</b>	ers			× Search by Identification Number or Consumer Name			٩
Alerts	s (4)						
	Expiration Date 🕹	Carrier	Status 🕕	Primary Consumer	Identification Number		
A	March 31, 2021	AIG	Sent to Agent 0 of 2 signatures, 0 issues	Piper, Peter	VB02172103		+ Action
A	March 31, 2021	AIG	Sent to Agent 0 of 2 signatures, 0 issues	Baggins, Bilbo	VB02172104		+ Action
A	March 31, 2021	AIG	Sent to Agent 0 of 2 signatures, 0 issues	Baggins, Bilbo	VB02172105		+ Action
A	March 31, 2021	AIG	Sent to Agent 0 of 2 signatures, 0 issues	Baggins, Bilbo	VB02172106		+ Action
			« < Page 1 of 1	> >			
Gene	eral Policies (7)						
Last	Activity Date 🕈	Carrier	Status 🕕	Primary Consumer	Identification Number		
Feb	oruary 17, 2021	AIG	Delivery Requirements Received 2 of 2 signatures, 0 issues	Baggins, Bilbo	VB02172108		4 Action
Feb	oruary 18, 2021	AIG	Sent to Consumer 1 of 2 signatures, 0 issues	Baggins, Bilbo	VB02162105		<b>4</b> Action
Feb	oruary 18, 2021	AIG	Printed for Paper Delivery by Agent	Brown, Charlie	VB02092102		+ Action

### Dashboard overview

An Agent's cases are arranged in two sections on the DocFast dashboard:

#### Alerts section (AMBER-colored grid)

• These cases require attention or an action by the Agent.

#### **General Policies** (in the **BLUE**-colored grid)

 These cases are in the system awaiting a client or action by another party, and do not require action by the Agent.

#### **Dashboard features and functions:**

- 1. Filter viewable cases by time frame and number of policies
- 2. Search by ID number or client name
- 3. Reorder by dates
  - Link Expiration Date for Alerts
  - Last Activity Date for General Policies
- 4. Get a snapshot view of the eDelivery workflow status under the Status column
- 5. Access the Document Details screen by clicking the case Identification Number
- 6. View the Policy PDF by clicking the PDF icon
- 7. Perform a DocFast Action (see next page for Action details)



### Available Actions from the Dashboard



For cases in the Alert section, users can:

- E-Sign and e-Deliver to client
- Change Request
- Print and Hand Deliver

For cases in the General Policies section, users can:

- Resend
- Change Request
- Print and Hand Deliver

For a detailed description of each action, see the Actions section starting on page 13.

### Workflow overview

Agents can view their agency's workflow setup by navigating to the **Policy Information** section of Connext and clicking the **eDelivery Method** for a specific policy.

Three workflow options are available.

DTC: Direct to Consumer (2 silhouettes)

> Direct from AIG to Consumer

CDAC: Carrier – Distributor – Agent – Consumer (4 silhouettes) > From AIG to BGA/Agency for Approval > To Agent for Approval > Delivery to Customer Note: CDAC is only available for agencies with an established iPipeline relationship.

CAC: Carrier – Agent - Consumer (3 silhouettes) > From AIG to Agent for Approval > Delivery to Customer

The CDAC and CAC workflows are customized at the BGA/MGA agency level to determine approval responsibilities and requirements for BGAs/MGAs and downlines .



### Workflow Status – Role descriptions

In the Status column, appearance of the silhouettes will vary depending on the role and next steps. Click the Helper Text symbol (next to Status) to view explanations of each role.



### Accessing Document Details from the Dashboard



### Initial email to agent to begin DocFast process

#### If Agent approval is required under an agency's workflow preference:

The Agent will receive the email below that the policy is available to approve for electronic delivery. Click the "Access the Policy" button to be taken to the Document Details.



#### If Agent approval is NOT required under an agency's workflow preference:

The Agent will receive the email below noting the policy has been electronically delivered. The Agent may still track its progress by clicking the "Access the Policy" button.

#### [EXTERNAL] New Policy VB03102107 for Peter Piper has been electronically delivered



AIG New Business < AIGSS NBRush-Escalations@aig.com>





Wed 3/10/2021 4:24 PM

...

This message is from an external sender; be cautious with links and attachments



Dear Vanessa AgentBGA,

Policy VB03102107 for Peter Piper has been electronically delivered.

The policy does not require your approval. It does, however, require review and eSignature from the Client(s).

We encourage you to track your clients' eDelivery process to ensure fastest inforce placement.

Please click on the link below to view the policy.

#### ACCESS THE POLICY

#### Thank you.

#### Privacy Policy | HIPPA Notification

Policies and Annuities issued by American General Life Insurance Company (AGL), Houston, TX except in New York, where issued by The United States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and US Life are responsible for financial obligations of insurance products and are members of American International Group, Inc. (AIG). Guarantees are backed by the claims-paying ability of the issuing insurance company. Products may not be available in all states and product features may vary by state. Please refer to your policy or contract

### Document Details overview

AIG AGENT DO	CFAST CENTER			My Dashboa	ard Vanessa Agent +
Document I	Details			Download PDF	Document Actions ~
New Document Package	This is a new document package for your ap	proval.			e-Sign and e-Deliver to Consum Change Request
Document Summary		<b>^</b> 3	O Status: Received by	Agent	Print and Hand Deliver
2	Common Details	^		0	
dentification Number	VB02092102		- 📥	-> (?) ->	
rimary Consumer	Charlie Brown		Carrier	Agent	Consumer
	78 Rodriguz Ave Badam		Name Role	Status	Action
	Dallas, TX 75203		Agent, Vanessa Agent	t 🔷 Delivered Awaitin	g Signature
elivery Expiration Date	March 31, 2021		Brown, Charlie Owne	er-Insured 🙎 Not Sent	
Ionthly Premium	\$237.86				
ace Amount	\$5,000,000	4	Activity History		^
	Specific Details	^	Date	Activity History	
gency Code	G5771		Feb 18, 2021 12:00:05 AN	M Document reminder notificati	on sent to Agent Vanes
gency Name	Financial Independence Group Inc			sa Agent at vanessa.agent2	2@aig.com
gent Name	Vanessa Agent		Feb 10, 2021 10:52:54 AN	M Carrier Case Manager Admin sent document notification to	istrator Mona Hubbard Agent Vanessa Agent
uration	15			at vanessa.agent22@aig.co	m or document VB020
ace Amount	500000.00		Eeb 10, 2021 10:52:44 AA	J2 IUZ	
ngoing Premium	237.86		1 CD 10, 2021 10.32.44 AN		
			L		
ayment Frequency	Monthly				
ayment Frequency ayment Method	Monthly Bank Draft				
ayment Frequency ayment Method rimary Insured Name	Monthly Bank Draft Charlie Brown				

#### The Document Details screen contains:

- 1. Summary of the eDelivery Case
- 2. Details for the eDelivery Case
- 3. Status for each Party
- 4. Activity History

#### Actions available on the Document Details screen:

- e-Sign and e-Delivery to Consumer
- Change Request
- Print and Hand Deliver
- Resend (only available *after* initial delivery to client)

Note: Actions are not available if a case is "Read-Only."

Begin the review and approval process

AIG AGENT DOG	CFAST CENTER			My Dashboard	Welcome Vanessa Agent +
🔆 Document [	Details				ocument Actions ~
New Document Package	This is a new document package for your ap	pproval.			e-Sign and e-Deliver Change Request
Document Summary		~	③ Status: Received by a	Agent	Print and Hand Delive
	Common Details	^		0	
Identification Number	VB02092102		- 🛋 -	→ (?) →> (	
Primary Consumer	Charlie Brown 78 Rodriguz Ave Badam Dallas, TX 75203		Carrier Name Role Agent, Vanessa Agent	Agent Con Status	sumer Action
Delivery Expiration Date	March 31, 2021		Brown, Charlie Owner	r-Insured 🙎 Not Sent	
Monthly Premium	\$237.86				
Face Amount	\$5,000,000		Activity History	Activity History	^
Agapay Code	C5771		Feb 18, 2021 12:00:05 AM	Document reminder notification s	sent to Agent Vanes
Agency Name	Financial Independence Group Inc			sa Agent at vanessa.agent22@	aig.com
Agent Name	Vanessa Agent		Feb 10, 2021 10:52:54 AM	Carrier Case Manager Administra	ator Mona Hubbard
Duration	15		1	at vanessa.agent22@aig.com f	or document VB020
Face Amount	500000.00		s	92102	
Ongoing Premium	237.86		Feb 10, 2021 10:52:44 AM	Document created	
Payment Frequency	Monthly				
Payment Method	Bank Draft				
Primary Insured Name	Charlie Brown				
Effective Date	2021-02-15				

Once in the Document Details screen, click the Document Actions dropdown and choose "e-Sign and e-Deliver to Consumer."

The client's document package will be prepared for the user's review.

Step 2: Review and approve document package



Review the document package, paying close attention to the Policy Packet and the Addendum (if present). When satisfied, click the "I have Reviewed This Document" yellow button.

The Agent could receive any of the following forms:

- Policy Packet
- Addendum
- Bank Draft (empty)
- Good Health Statement (empty)

If a change is needed to the policy packet, click the GRAY Cancel button to initiate a DocFast Change Request.

Step 3: Deliver policy to client



# Review, approve and deliver policy to client Agent reminder email/notification

[EXTERNAL] Reminder: New Policy VB02102103 for Bilgo Baggins re	equires yo	ur approval;	Action Requ	uired						
AIG New Business < AIGSS_NBRush-Escalations@aig.com>	← Reply	所 Reply All	$\rightarrow$ Forward	•••						
To • Brusseau, Vanessa Thu 2/18/2021 9:08 PM										
This message is from an external sender; be cautious with links and attachments.				-						
Dear Vanessa Agent,										
This is a reminder to let you know Policy VB02102103 for Bilgo Baggins requires your approv	val. This step i	s required to del	iver the policy.							
Please click on the link below to view and approve the policy.										
If there are any questions, please contact our Customer Service team at 800-247-8837 or yo	our agency for	further informat	tion.							
ACCESS THE POLICY										
Thank you.										
Privacy Policy   <u>HIPPA Notification</u> Policies and Annuities issued by American General Life Insurance Company (AGL), Houston, States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and insurance products and are members of American International Group, Inc. (AIG). Guarantee issuing insurance company. Products may not be available in all states and product features contract.	TX except in N US Life are re es are backed may vary by s	lew York, where sponsible for fina by the claims-pa state. Please refe	issued by The Un ancial obligations aying ability of th er to your policy o	nited s of e or						

The Agent will receive a reminder after seven days if the • policy has not been approved and delivered.

Reminder to Agent

AIG AGENT DO	CFAST CENTER			My Dasl	welcome Vanessa Agent -
G Document I	Details			Download PDF	Document Actions ~
New Document Package	This is a new document package for your appro	oval.			*
Document Package Rem	inder Document Reminder				×
Document Summary		^	Status: Received by A	lgent	^
	Common Details	~		0	
Identification Number	VB02102103		l 🍊 -	> 2 ->	-
Primary Consumer	Bilgo Baggins 78 Rodriguz Ave Badam Dallas, TX 75203		Carrier Name Role Agent, Vanessa Agent	Agent Status Delivered Aw	Consumer Action
Delivery Expiration Date	March 31, 2021		Baggins, Bilgo Owner-	Insured 💧 Not Sent	
Monthly Premium	\$2,782.00				
Face Amount	\$5,000,000		Activity History		^
	Specific Details	~	Date	Activity History	
Agency Code	G5771		Feb 18, 2021 9:07:43 PM	Document reminder notifi	cation sent to Agent Vanes
Agency Name	Financial Independence Group Inc			sa Agent at vanessa.agei	nt22@aig.com
Agent Name	Vanessa Agent		Feb 11, 2021 4:26:42 PM	Carrier Case Manager Ad	Iministrator Prem Kumar s
Duration	15			t vanessa.agent22@aig.c	com for document VB021
Face Amount	500000.00			02103	
Ongoing Premium	237.86		Feb 11, 2021 4:26:34 PM	Document created	
Payment Frequency	Monthly				
Payment Method	Bank Draft				
Primary Insured Name	Peter Piper				
Effective Date	2021-02-15				
Policy Number	VB02102103				
Product Namo	Soloct a Torm AGI				

- An additional RED Message appears at the top of the Dashboard screen after a reminder email notification is sent to the Agent.
- The Activity History will reflect the document reminder notification was sent.



Action

6

Activity History

Close

or document VB02092101: Update to Proposed Ins

# Change Request Status change in DocFast

AIG AGENT DOG	CFAST CENTER				My Das	hboard	Welcome Vanessa Agent
🔆 Document [	Details				Download PDF	Doo	cument Actions ~
Document Summary		~	I Status: Chang	e Requ	ested by Agent		~
	Common Details	~	C	)			
Identification Number	VB02092101		1	$\leq$	- 🍝 ->	- 🛋	
Primary Consumer	Charlie Brown		Carr	ier	Agent	Consu	ımer
	78 Rodriguz Ave Badam Dallas, TX 75203		Name	Role	Status		Action
			Agent, Vanessa	Agent	Completed Ac	cepted Si	gnature
Delivery Expiration Date	March 31, 2021		Brown, Charlie	Owner-I	nsured 👗 Not Sent		
Monthly Premium	\$237.86						
Face Amount	Specific Details		Activity History				
		^	Date		Activity History		
Agency Code	G5771		Feb 18, 2021 9:30:	15 AM	or document VB0209210	bmitted a 1: Update	to Proposed Ins
Agency Name	Financial Independence Group Inc				ured: New married name	is Charlie	e Brown-Shultz
Agent Name	Vanessa Agent		Feb 18, 2021 12:00	0:06 AM	Document reminder notif	ication ser	nt to Agent Vanes
Duration	15				sa Agent at vanessa.ag	ent22@a	Ig.com
Face Amount	500000.00		Feb 10, 2021 11:50	J:52 AM	Agent vanessa Agent e-s	Signed Do	ocument.
Ongoing Premium	237.86		Feb 10, 2021 11:48	3:20 AM	Vanessa Agent viewed ne r approval.	ew docum	nent detail for thei
Payment Frequency	Monthly		Feb 10, 2021 10:53	3:35 AM	Carrier Case Manager Ag	dministrate	or Mona Hubbard
Payment Method	od Bank Draft				sent document notificatio	on to Agen	t Vanessa Agent
Primary Insured Name	Charlie Brown				at vanessa.agent22@aig.com or document VB020		
Effective Date	2021-02-15						
Policy Number	VB02092101				Show more		
Product Name	Select-a-Term - AGL			_			

- Once the "Change Request" action is completed, the • icon will appear as an AMBER silhouette to indicate the case has been paused to await the Change Request fulfillment.
- The Activity History will reflect the Change Request • activity along with any descriptive text provided when the request is submitted.

nt -

### Change Request Client error message

If a change is requested by any party, the client will not receive an email but they will see the error message below if they try to log in.



### Resend

Submitting the Resend request in DocFast



### Resend

Status change in DocFast



- Once the "Resend" action is completed, the icon will be a GREEN silhouette to indicate the email notice was resent to the client.
- The Activity History will reflect the Resend activity along with the email address used.

# Print and Hand-Deliver

Selecting in DocFast



### Print and Hand-Deliver Status in DocFast

AIG AGENT DO	DCFAST CENTER				My Dashboard	Welcome Vanessa Agent
G Document	Details			Download F	PDF Doc	ument Actions ~
Document Summary		^	Itatus: Printed for F	Paper Delivery by	Agent	^
	Common Details	~				
Identification Number	VB02092102		L 🍝	-> Ă	->	
Primary Consumer	Charlie Brown		Carrier	Agent	Consur	mer
	78 Rodriguz Ave Badam		Name	Role	Status	Action
	Dallas, TX 75203 @agla.com		Agent, Vanessa	Agent	Not Sent	
Delivery Expiration Date	March 31, 2021		Brown, Charlie	Owner-Insured	Not Sent	
Monthly Premium	\$237.86					
	Specific Details	~	Activity History	Activity History	,	^
Agency Code	G5771		Feb 18, 2021 9:32:56 AM	Agent Vanessa	Agent viewed a cop	y of the docume
Agency Name	Financial Independence Group Inc		·	nt documents fro	om the DocFast app	olication.
Agent Name	Vanessa Agent		Feb 18, 2021 9:32:54 AN	<ol> <li>Agent Vanessa / 2 for paper deliv</li> </ol>	Agent printed docun ery	nent VB0209210
Duration	15		Feb 18, 2021 9:32:18 AM	Vanessa Agent v	viewed new docume	ent detail for thei
Face Amount	500000.00			r approval.		
Ongoing Premium	237.86		Feb 18, 2021 12:00:05 A	M Document remin	nder notification sen	t to Agent Vanes
Payment Frequency	Monthly		Eeb 10, 2021 10:52:54 A	M Carrier Case Ma		r Mona Hubbard
Payment Method	Bank Draft		1 60 10, 2021 10.02.04 A	sent document r	notification to Agent	Vanessa Agent
Primary Insured Name	Charlie Brown			at vanessa.ager	nt22@aig.com for o	document VB020
Effective Date	2021-02-15					
Policy Number	VB02092102			Show more	e	
Product Name	Select-a-Term - AGL					

- Once the "Print and Hand Deliver" action is completed, the icon will change to a **RED** silhouette to indicate the policy is no longer part of the DocFast e-delivery process.
- The Activity History will reflect the review and print activity.

### Take approver ownership (Agency Case Manager only)

The Agency Case Manager in a BGA/MGA/Agency may need to take ownership of the document in order to have access to the DocFast Actions on a case. Common examples include:

- AIG did not have information on the Agency Case Manager for the policy, so DocFast assigned it to the default Agency Case Manager.
- All Agency cases are assigned to a Default Agency Case Manager with a shared email box.

Note: As an alternative, the Default Agency Case Manager can also Transfer Approval Ownership to another Agency Case Manager.



# eDeliver to Agent from BGA/MGA/Agency (Case Manager/KOP only)



This action is only available to the case manager at the BGA, MGA or agency (the Distributor), as part of the CDAC process.

After the Case Manager at the BGA/MGA/Agency receives notification from AIG that the policy is ready for eDelivery and is ready to send to the Agent, click the Document Actions dropdown and choose **e-Deliver to Agent**.

#### Document Details and Actions

# eDeliver to Agent from BGA/MGA/Agency (cont.) (Agency Case Manager/KOP only)

ent I	Details			Download PDF	Document Actions 🗸
ackage ge Exp	This is a new document participation This document pack	ackage for your approv kage will expire soon if	ral. not signed.	1	<ul> <li>e-Deliver to Agent</li> <li>Change Request</li> <li>Transfer for Approval</li> <li>Print and Hand Deliver</li> </ul>
nary	Common Details	Recipients Agent	Vanessa AgentBGA	- D'Al-Lo Los	Search
ber	VB03242113	E-mail Address	@ vanessa.agent22@aig.com		
	Peter GHSCA 78 Rodriguz Ave Badam Dallas, TX 75203	сс	@		
-	Vanessa.brusseau@agl	Sender			
Date	March 30, 2021 \$2.782.00	From Distributor E-mail	Vanessa DCMA vanessa.agent22@aig.com		
		Email			
		Upload Docu	meent	A is available for you to approve for	electronic delivery

- 1. Click the Document Actions dropdown and choose e-Deliver to Agent
- 2. Confirm email address of Agent and click button "Send Document to Agent"
- 3. Close the Success popup
- 4. The Document Details will reflect a **Green Distributor silhouette** indicating the step is complete.





# eDeliver to Agent from BGA/MGA/Agency (cont.) (Case Manager/KOP only)



If Agent approval is required under an agency's workflow preference, the Agent will receive an email (at left) that the policy is available for approval for electronic delivery. Click the ACCESS THE POLICY button to be taken to the Document Details.

If Agent approval is NOT required under the agency's workflow preference, the Agent will receive the email below noting the policy has been electronically delivered. The Agent may still track its progress by clicking the **ACCESS THE POLICY** button.

AIG New Business <aigss nbrush-escalations@aig.com=""></aigss>	S Reply	Keply All	$\rightarrow$ Forward	
To Agent22, Vanessa			Wed 3/10/2021	4:24
This message is from an external sender; be cautious with links and attachments.				
AIG				
Dear Vanessa ,				
Policy VB03102107 for Peter Piper has been electronically delivered.				
The policy does not require your approval. It does, however, require review and eSig	gnature from the	Client(s).		
We encourage you to track your clients' eDelivery process to ensure fastest inforce	placement.			
Please click on the link below to view the policy.				
ACCESS THE POLICY				
If there are any questions, please contact your New Business Team for further inform	mation.			
Thank you.				
Privacy Policy   HIPPA Notification				
Policies and Annuities issued by American General Life Insurance Company (AGL), He States Life Insurance Company in the City of New York (US Life), Issuing companies A	ouston, TX except AGL and US Life ar	in New York, when e responsible for fi	re issued by The U inancial obligation	nited s of
insurance products and are members of American International Group, Inc. (AIG), G	uarantees are bad	ked by the claims-	paying ability of th	ne

### Additional email notifications – Overview

In addition to the email notifications associated with the DocFast Actions which were shown in the previous section, Agents may receive additional email notifications during the eDelivery process for any of the following scenarios

- Client declines eDelivery of policy
- Client's eDelivery link has expired
- Client fails login
- Policy is approved and signed by client
- AIG cancels eDelivery link for policy

See the following pages for additional details on each email.

# Consumer declined eDelivery of policy

• The Agent and all client/customer parties on the case will receive an email when the client declines to complete and sign the packet.

Agent eMail Notice		Customer(s) eMail Notice				
[EXTERNAL] Consumer Declined eDelivery of Policy VB02162107 for Bilbo Baggins		[EXTERNAL] Mister Spock has Declined to Sign Policy VB03082101				
AIG New Business <aigss_nbrush-escalations@aig.com></aigss_nbrush-escalations@aig.com>		AlG Life Insurance <aigss_nbrush-escalation@aig.com></aigss_nbrush-escalation@aig.com>				
This message is from an external sender; be cautious with links and attachments.		This message is from an external sender; be cautious with links and attachments.				
Dear Vanessa Agent, This notification is being sent to inform you that the client, Bilbo Baggins, has stopped their ePolicy Delivery eSignature process. The reason Bilbo Baggins stated is:		Dear Mister Spock, We are writing to inform you that Mister Spock has declined to sign the Life Insurance Policy and provided the following information: This is to investigate text sent to Agent VB03082101				
I was recently diagnosed with Covid Policy VB02162107 for Bilbo Baggins will remain out of the approval process until the client's concern is addressed and a new link is generated.		Policy VB03082101 for James Kirk will remain out of the approval process until this is addressed. If there are any questions, please contact your agent for further information. Sincerely.				
If there are any questions, please contact our Customer Service team at 800-247-8837 or your agency for further information.         Regards,         AIG         Privacy Policy   HIPPA Notification         Policies and Annuities issued by American General Life Insurance Company (AGL), Houston, TX except in New York, where issued by         The United States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and US Life are responsible for         Financial obligations on products and are members of American International Companies (AIC).		AIG Privacy Policy   HIPPA Notification Policies and Annuities issued by American General Life Insurance Company (AGL), Houston, TX except in New York, where issued by The United States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and US Life are responsible for financial obligations of insurance products and are members of American International Group, Inc. (AIG). Guarantees are backed by the claims- paying ability of the issuing insurance company. Products may not be available in all states and product features may vary by state. Please refer to your policy or contract.				
the claims-paying ability of the issuing insurance company. Products may not be available in all states and product features may vary by state. Please refer to your policy or contract.	*					

## Policy eDelivery link has expired

The Agent and all client/customer parties on the case will receive an email when the client's link has expired.

Agent eMail Notice	Customer(s) eMail Notice					
IEXTERNAL] Policy DL1-031021 for Test1 Owner: Policy delivery has Expired	Image: Second Secon					

...

# Consumer failed login; Action required

- The Agent will receive an email when the client fails their login after 3 attempts.
- Login errors may result from entering ZIP code, date of birth, and/or last four digits of Social Security number that does not match what's on the application.

Agent eMail N	otice				
[EXTERNAL] Policy VB02162101 for Peter Piper: Consumer	<sup>r</sup> failed login;	Action Requ	uired		
AIG New Business <aigss nbrush-escalations@aig.com=""></aigss>		Keply All	$\rightarrow$ Forward		
To O Brusseau, Vanessa		Wed 2/24/2021			
This message is from an external sender; be cautious with links and attachme	nts.				
AIG					
Dear Vanessa Agent,					
We are writing to inform you that your client, Peter Piper, has failed login valid Peter Piper.	ation while attem	pting to review p	policy VB0216210	)1 for	
The consumer will be locked out of the DocFast Consumer Portal until you go to Menu to Peter Piper. This will send a new link to the client, and the old link will	o your dashboard   be disabled.	and select "Rese	end" from the Act	tion	
If appropriate, please contact Peter Piper at Vanessa.brusseau@agla.com to as	sist them with the	eir policy.			
If there are any questions, please contact our Customer Service team at 800-24	7-8837 or your a	gency for further	information.		
Regards, AIG					
Privacy Policy   HIPPA Notification Policies and Annuities issued by American General Life Insurance Company (AG The United States Life Insurance Company in the City of New York (US Life). Issu financial obligations of insurance products and are members of American Inter- claims-paying ability of the issuing insurance company. Products may not be av state. Please refer to your policy or contract.	iL), Houston, TX e: uing companies A national Group, Ir railable in all state	xcept in New Yor GL and US Life ar nc. (AIG). Guaran es and product fe	k, where issued b re responsible for tees are backed b atures may vary b	by by the by	

### Policy has been approved and signed by Client

- The Agent will receive an email after each signing party has completed the eDelivery process.
- Client/customer parties on the case will also receive an email notification when their part of e-Delivery is completed. However, they cannot review and print until <u>all parties</u> have completed their part of the process.



### AIG has cancelled eDelivery link for policy

The Agent and all client parties on the case will receive an email notification when the eDelivery process has been cancelled. Note: This does not mean that the policy or case is cancelled. Only the eDelivery process is cancelled.

Agent eMail I	Notice			
[EXTERNAL] eDelivery Link for Policy VB040100006 for	or John Smi	th: Canceled	by AIG	
AIG New Business <aigss nbrush-escalations@aig.com<="" th=""><th></th><th>K Reply All</th><th><math>\rightarrow</math> Forward</th><th></th></aigss>		K Reply All	$\rightarrow$ Forward	
To O Brusseau, Vanessa			Thu 4/1/2021	8:03 PN
his message is from an external sender; be cautious with links and at	achments.			
AIG				
Dear Vanessa AgentBGA,				
his notification is being sent to inform you that the AIG New Business, /B040100006 for John Smith.	has canceled th	e eDelivery link f	or policy	
olicy VB040100006 will be removed from the approval process.				
there are any questions, please contact our Customer Service team at	800-247-8837	or your agency fo	r further informa	ation.
legards, IG				
rivacy Policy   <u>HIPPA Notification</u> olicies and Annuities issued by American General Life Insurance Compa ssued by The United States Life Insurance Company in the City of New Y esponsible for financial obligations of insurance products and are mem Suarantees are backed by the claims-paying ability of the issuing insura	any (AGL), Hous 'ork (US Life). Is bers of America nce company. P	ton, TX except in suing companies n International G roducts may not	New York, where AGL and US Life Group, Inc. (AIG). be available in al	e are II

### Customer(s) eMail Notice [EXTERNAL] Policy VB040100006 for John Smith: Link has been Canceled by AIG ← Reply ← Reply All → Forward ... AIG Life Insurance <AIGSS NBRush-Escalation@aig.com> To 📀 Brusseau, Vanessa Thu 4/1/2021 8:03 PM This message is from an external sender; be cautious with links and attachments. The link to the AIG Life Insurance policy VB040100006 for John Smith has been canceled by AIG and removed from the If you would like to reinstate this Policy Delivery Link, please contact your agent for further information.

#### Privacy Policy | HIPPA Notification

Dear John Smith,

approval process.

Regards, AIG

Policies and Annuities issued by American General Life Insurance Company (AGL), Houston, TX except in New York, where issued by The United States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and US Life are responsible for financial obligations of insurance products and are members of American International Group, Inc. (AIG). Guarantees are backed by the claims-paying ability of the issuing insurance company. Products may not be available in all states and product features may vary by state. Please refer to your policy or contract.

### Questions?

If you have issues with DocFast eDelivery: Call the iPipeline Support Center at 1-800-641-6557, or email support@ipipeline.com.

If you have questions about your case: Contact your Case Relationship Manager or AIG sales representative.

### Additional resources:

Client Guide to DocFast eDelivery (approved for sharing with clients)

Policies issued by American General Life Insurance Company (AGL), Houston, TX, except in New York, where issued by The United States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and US Life are responsible for financial obligations of insurance products and are members of American International Group, Inc. (AIG). Guarantees are backed by the claims-paying ability of the issuing insurance company. Products may not be available in all states and product features may vary by state. Please refer to your policy.

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