DocFast FAQs

1. **Who to contact for assistance with DocFast?**
   iPipeline Support @ support@ipipeline.com or 800-641-6557 (5am-5pm Pacific M-F)

2. **How do I access my dashboard?**
   You will receive an email from iPipeline/DocFast with a link to proceed with eDelivery of the policy. If an active link for the policy is not received, contact your Case Manager to request a new link to be sent.

3. **When I click the link, I am denied access. What can I do?**
   a. Close all your browsers.
   b. Open your email notification and use the link in that email.
   c. If you continue to receive error notices, please contact DocFast support (see #1 above).

4. **How do I change my client's email address after I've sent the policy?**
   Contact the appropriate your Case Manager to have the email address updated. A *new policy* link will be sent to the new email address.

5. **I am trying to send the policy to my customer, but when I select the *Send* button, I receive a "Please Wait" message and nothing happens.**

   a. Reset your view by selecting Filters and choose "All" next to "Display document with activity in."
   b. Choosing "All" policies in the dashboard view usually resolves the "Please Wait" issue and you can then e-deliver the policy to your customer.

6. **The customer is locked out of the policy. Can the link be refreshed?**
   Once a consumer is locked out of a policy, you must send a new link. To resend a policy link, use the Action button and select "Resend Policy."
   **If the customer has already signed, confirmed or declined acceptance electronically, no further action is possible. Please contact your Case Manager for assistance.

7. **My customer entered the last four digits of his/her Social Security number and was denied access. What can I do now?**
   a. Verify that your customer is using the same last four numbers of the SSN as those on the application.
   b. If the SSN on the application is incorrect, contact the carrier New Business Associate/Case Manager with the correct SSN. The carrier will then make the correction and reissue the policy.
   c. If the SSN on the application is correct, but the customer entered a different number, resend the policy to your customer to refresh the link and restore access to the policy.

8. **I received notification that my customer has successfully logged in to the policy. Does this mean the policy is in force?**
   No. You will receive notifications whenever customers access policies, until the point when customers complete the signature and acceptance process.

9. **Once the customer signs and accepts the policy, how can I verify all requirements have been satisfied?**
   a. Locate the policy on your dashboard and open the policy's *.PDF* file.

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b. Scroll to the end of the document to view the signatures and the Certificate of Completion.

At this point, the policy may not be in force. The carrier receives notification when a policy is accepted and then processes the delivery requirements. The policy is usually placed in force within one or two business days, provided everything is in order, including valid account information for the initial premium draft, if required. When there is an issue with a delivery requirement, the writing producer is advised if further action is required.

10. *(Lincoln National ONLY)* **How do I print a policy for delivery if the customer does not wish to receive the policy electronically?**
    a. Log into DocFast
    b. Select "Actions" and "Print and Hand Deliver." (Do not click on the *.PDF* icon in the dashboard or summary view. That will open a file with a watermark.)

11. *(Lincoln National ONLY)* **I can select "Print and Hand Deliver" but the document window does not open.**
    a. Make sure the pop-up blocker in your browser is turned off.
    b. Confirm that the document did not open behind a window open on your desktop.
    c. Close all browsers.
    d. Use the email link to reopen the policy.
    e. Use the "Actions" button to find the printing option. (*Do not click on the .PDF icon.*)
    f. Close all versions of the policy file (including the .PDF and/or the one from which you are trying to print.

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