# Log Into DocFast for First e-Delivery

Before you can register your account for DocFast, a document must be assigned to you for e-Delivery. This document can be assigned to you in several different ways, including:

- From the Carrier to the BGA Case Manager
- From a BGA Case Manager to another BGA Case Manager
- From a BGA Case Manager to the Agent

#### 1. Open the Document Notification Email

In any of the above cases, an email message will be sent to you that includes a link to access the document package. Select the "Click here to access your document package" link to be brought to the registration page.

	LeslieCarter's Life Insurance Policy is Now Available $\mathcal{D}$ Inter $\times$
-	Doug Morgan docfasttraining+distributor@gmail.com <u>via</u> joipeline.com to me +
	Hello John,
	Leslie Carter's ePolicy from General Life is now available online.
	In order for Leslie to become fully covered, you need to electronically sign the delivery receipt. Click the link below to access the policy online.
	Click here to access the policy.
	Sincerely,
	Doug Morgan
	Mountain Top Distributors

#### 2. Register Your Account

Complete your registration by filling out the fields on the screen and choosing the **Create Account** button. Choose **Log In** in the pop up window to automatically log into DocFast. Your username displays in a pop up window and is sent to you in a separate confirmation email.

Congratul you have succ your DocF	ations John, cessfully created ast account!	×
Your us	sername is:	
jtayl	or12245	
	>	Log In
Security Questions		
Question #1	Answer	
What is your mother's ma	Williams	
Question #2	Answer	
What was the name of yc 🔹	Kings	
Question #3	Answer	
What city you were born i 🔹	Houston	
Creat		
Already have a	n account? Log In	



# Access the Print and Hand Deliver Form

- 1. Log into DocFast.
- 2. From the DocFast Dashboard, find the correct case.
- 3. Choose one of the following two options to display the Print and Hand Deliver form.

# Option 1

1. Select **Print and Hand Deliver** from the corresponding **Action** dropdown.



## **Option 2**

1. Select the case's **Identification Number** and click the **More Details** button to navigate to the **Policy Details** page.

MOUNTAIN TOP DETREMINING	AGENT DOCFAST	CENTER				
			Welcome A	aron Cruz Log Out	Help	PIPELINE'
April 24, 2017	IT GENERAL, IFT	A -+ A -+ A -+ A Sent to Converner 1 of 2 signatures, Dissues	Llovid, John	06775454	1	4 Action
April 24, 2017	IT GENERALL IT	Arrow And Arrow	Devid, John Latest Activ	day April 24, 2017 Sentito Consum	×	+ Action
April 20, 2017	P GENERAL LIFE	Dalvery Requirements Received 2 of 2 signatures, 0 issues	Galloghor, Mar Calloghor, Mar	p. Data May 8, 2017 Mountain Top Di ger Jones, Donald	tributora	# Action
April 20, 2017	IT GENERALLITE	Sent to Consumer 1 of 2 signatures, 0 issues	Front, Michiel Policy Nam	Cruz, Awon ber 88775454		+ Action
April 20, 2017	2 00MPAL (71	Printed for Paper Delivery by Agent 0 of 2 signatures; 0 insues	Emis, Casey	More Details	R	# Action

2. From the Policy Details page, click the Action dropdown and choose Print and Hand Deliver.

MOUNTAIN TOP DISTRIBUTIORS AGEN	NT DOCFAST CENTER	
		Welcome Aaron Cruz Log Out Help
∳ Action		Back to My Dashboar
Resend Change Request		Status: Sent to Consumer
Lecline Offer Request Extension		
Print and Hand Deliver Document Summary		Carrier Distributor Agent Consumer
C	Common Details	Signer Status
Identification Number	56775454	
Primary Consumer	John David docfastsales@lpipeline.com	Cruz, Aaron Agent L Completed Accepted Signature
	May 6, 2017	David, John Insured 🚣 Delivered Awaiting Signature Hosond
Delivery Expiration Date		

# Print and Hand Deliver

1. Once the **Print and Hand Deliver** form loads, click **OK** to complete the action.

Do you want to print the document for hand delivery? Once the document has been printed, you will no longer be able to
electronically sign or electronically deliver the document.
Document signatures have been received from
Aaron Cruz (Agent)
Document signatures have not been received from
John David (Consumer)

You will receive a confirmation that the action has been completed.



# Case Manager: e-Deliver the Document to the Agent

A Case Manager, can review and approve a document, then e-Deliver the document to the Agent. This option is selected, a form displays where the Agent's information is added, can cc/bcc others and add a custom message before sending..

1. From the **Policy Details** page, click the **Document Actions** dropdown and choose **e-Deliver to** 

Agent.



2. Enter the agent's name and email at the top of the e-Deliver Document to Agent form.

3. To include a custom message, add text into the Custom Text field.

4. Once you have completed the form, click the Send Message to Agent button.

-A success message will indicate the email has been sent to the Agent. -At this point, the Distributor Status has turned to green and the **Signer Status** section has updated to display the Agent as **Delivered Awaiting Signature**.





# Agent: e-Deliver the Document to the Consumer

An Agent, can choose to e-Sign a document, then e-Deliver it to a consumer. When this option is selected, they will be walked through the e-Signature process. Once the document is e-Signed, a form displays where you can enter the consumer's information, cc/bcc others, or add a custom message before sending.

- 1. Log into DocFast.
- 2. Find the correct case from the DocFast Dashboard.
- 3. Choose one of the following two options to access the e-Sign and e-Deliver to Consumer option.

## **Option 1**

1. Select **e-Sign and e-Deliver to Consumer** from the corresponding **Action** dropdown in the DocFast Dashboard.



## Option 2

1. Select the case's Identification Number and click the More Details button to navigate to the Policy Details



2. From the **Policy Details** page, click the **Document Actions** dropdown and choose **e-Sign and e-Deliver to Consumer**.



-At this point, you will be walked through the e-Signature process.

#### Complete the e-Signature Process

1. Click Start within the e-Signature process to be guided through the document signatures.





- 2. Review the document and click the **Sign** option wherever a signature is required.
- 3. After all required signatures are completed, click the **Finish** button in the top right.
  - -A form displays to e-Deliver the document to the Consumer.

# e-Deliver the Document to the Consumer

- 1. Enter your client's name and email at the top of the **Consumer Signature** form.
- To include a custom message, add text into the Custom Text field.
   Once you have completed the form, click the Send Message to Client button.

-You will receive a success message which indicates that the email has been sent to the Consumer. -At this point, the Agent Status has turned to green and the Signer Status section has updated to display the Agent as Completed Accepted Signature.





# How the Consumer Signs the Policy

1. Once the agent has received the success message, the consumer receives an email to log into DocFast and sign the policy.

docfastsales+agent@gmail.com «PoicyDelwerv@inipeline.com»	5/23 PM (15 hours ago) 💠	*
to me 👻	o to the trons also the	
Hi John,		
Congratulations on being approved for your Life Insurance coverage! In you to acknowledge receipt of this policy by electronically signing the del access your policy online.	order to become fully covered, we will ne very requirements. Click the link below t	red to
Congratulations on being approved for your Life Insurance coverage! In you to acknowledge receipt of this policy by electronically signing the del access your policy online.	order to become fully covered, we will ne very requirements. Click the link below t	red to
Congratulations on being approved for your Life insurance coverage! In you to acknowledge receipt of this policy by electronically signing the del access your policy online.	order to become fully covered, we will ne very requirements. Click the link below t	to
Congratulations on being approved for your Life Insurance coverage! In you to acknowledge receipt of this policy by electronically signing the del access your policy online.	order to become fully covered, we will ne very requirements. Click the link below t	to

2. The consumer is then taken through the same process of reviewing and e-Signing the document as the agent completed.

3. Once all required fields have been signed, the consumer is given the option to print or download a copy of their completed policy and the agent receives an email notification that the policy has been completed. The Consumer icon has now changed to solid green and the **Signer Status** section has been updated to display

the Insured as Completed Accepted Signature. The policy has been sent back to the insurance carrier.

2			2
Carrier	Distribu	utor Agent	Consumer
anos Ciatus			
gner Status	4		
gner Status Name	Signer Role	Signer / Attachment Status	Action
gner Status Name Cruz, Aaron	Signer Role Agent	Signer / Attachment Status	Action



# **Available DocFast Actions**

#### e-Deliver to Agent

As a Case Manager, you can review and approve a document, then e-Deliver the document to the Agent. When you select this option, a form displays where you can enter the Agent's information, cc/bcc others, and add a custom message before sending.

## e-Sign and e-Deliver to Consumer

An Agent can choose to e-Sign a document, then e-Deliver it to a consumer. When you select this option, you will be walked through the e-Signature process. Once you have e-Signed the document, a form displays where you can enter the consumer's information, cc/bcc others, or add a custom message before sending.

# Change Request

You can submit a change request to the carrier by selecting a change request reason (such as a beneficiary change) and providing details about the change. You may submit multiple change requests within the same submission.

## Transfer for Approval

Distributor Case Managers can assign a document delivery to another Case Manager at their agency by transferring the document for approval within DocFast.

## Decline Offer

Within DocFast, you can submit that an offer has been declined by the consumer. When selecting this option, you can provide the reason(s) and details of why the offer is being declined before submitting to the carrier.

## Resend a Document

When choosing to resend a document, you will be presented with two options.

1. If the consumer(s) **is not** present, you are given the opportunity to review and make modifications to the email form before resending the document for the consumer to e-Sign.

2. If the consumer(s) **is** present, you can choose to sign with the face to face method. If you choose this option, the consumer will be prompted to answer the consumer quiz security questions before being walked through the e-Signature process.



# Submit a Change Request in DocFast

# Access the Change Request Form

- 1. Log into DocFast.
- 2. From the DocFast Dashboard, find the correct case.
- 3. Choose one of the following two options to display the **Change Request** form.

# **Option 1**

1. Select Change Request from the corresponding Action dropdown.



<u>Option 2</u> 1. Select the case's **Identification Number** and click the **More Details** button to navigate to the Policy Details page.

	r DocFast C	Center		My Dashboard	Welcome Alex Craft +
<b>Y</b> Filters			X Search by Ident	tification Number or Consumer Name	٩
Alerts (2)					
Expiration Date 🕇	Carrier	Status 🚯	Primary Consume	r Identification Number	
A July 18, 2018	R	Received by Agent 0 of 2 signatures, 0 issues	Wentz, Carson	DEMO-1018	# Action
	en CUNA	4-4-4-4	De	etails x	
A July 31, 2018	SR MUTUAL CREUP	Sent to Censumer 1 of 2 signatures, 0 issues	Censumer, Tr	atest Activity October 1, 2018	\$ Action
		+ + Pape 1 of 1	3	tatus Received by Agent	
			0	Istributor Mountain Top Distributors	
General Policies (12)			0	ase Manager Drown, Kevin DCMA	
Last Activity Date 🕇	Carrier	Status 😗	Primary Consu P	elicy Number DEMO-1018	
September 26, 2018	R CUNA NUTTIAL CROOP	Delivery Requirements Received 2 of 2 signatures, 0 issues	Smith, John	More Delaits	4 Action
September 19, 2018	R CUINA MUTTUAL CHOUP	Delivery Requirements Received 2 of 2 signatures, 0 issues	Halpen, James	8673309	∲ Action
August 29, 2018	R CUNA METTUAL CHOOP	Eclivery Requirements Received 2 of 2 signatures, 0 issues	Wick, John	testpolicy-9207	4 Action
August 21, 2018	R	Delivery Requirements Received 2 of 2 signatures, 0 issues	Martin, Stava	testpolicy8472	∳ Action
August 2, 2018	R	Delivery Requirements Received	Calle, Julio	75883475423	≁ Action



2. From the Policy Details page, click the Document Actions dropdown and choose Change Request.

	DOCFAST CENTER						Dashboard Welcome Alex Craft +
🔆 Document De	tails				Download	PDF	Document Actions ~
Document Summary		<u>^</u>	O Status: Recei	ved by Age	ent		Change Request
(	Common Details	^				0	Lecline Offer
Identification Number	DEMO-1018			- 6		?	Print and Hand Deliver
Primary Consumer	Carson Wentz docfasttraining+consumer@gmail.com		Carrier	Distrib	utor	Agent	Consumer
Delivery Expiration Date	July 18, 2018		Name	Role	Status		Action
			Craft, Alex	Agent	Receive	d Awaiting S	Signature
		_	Wentz, Carson	Insured	Not Sen		
			Activity History				<u>^</u>
			Date		Activity His	tory	
			Oct 1, 2018 12:0	5:12 PM	Distributor ( DCMA Brow Distributor ( Morris at docfasttrain document E	Case Manag n sent docu Case Manag ing+distribu EMO-1018	er Administrator Kevin ment notification to er Administrator David toradmin@gmail.com for
			Oct 1, 2018 12:00	5:12 PM	Distributor ( DCMA Brow document D Manager Ad	Case Manag n took appr EMO-1018 Iministrator	er Administrator Kevin over ownership of from Distributor Case David Morris
			Aug 9, 2018 6:00	15 AM	Document r Alex Craft a	eminder not t docfasttrai	ification sent to Agent ning+agent@gmail.com
			Jul 10, 2018 11:3	6:37 AM	Carrier Cas	e Manager	Administrator Chris
					Mathis sent Carson Wei docfasttrain document D	ntz at ing+consum EMO-1018	er@gmail.com for

- <u>Submit the Change Request</u> Once the **Change Request** form loads, follow the steps below to submit the change request.
- 1. Select a reason for the change request from the **Reason** dropdown.
- 2. Provide details about the change request in the **Description** field.

Please provide a description of the change required	
teason	
Update to Beneficiary	•
Jescription	
Beneficiary needs to be updated to consumer's son, Ryan David.	
ou have 58 characters left	

3. If applicable, click the Add another reason button and enter another reason and description.

Change Request	
Changes Requests	
Update to Beneficiary	۲
Beneficiary needs to be updated to consumer's son, Ryan David.	
Discussion of the state of the	
Prease provide a description of the change required	
Update to Policy effective date	•
Description	
Policy effective date needs to be moved to 1/1/2018	
You have 69 characters left	
Add another reason Submit	Cancel

- 4. Once all change requests have been entered, click **Submit**.
  - -You will receive a confirmation that the change request has been submitted.

-At this point, the Carrier is notified of the change and will reissue the policy. Once the policy has been reissued, you will receive an email with the updated policy.

