

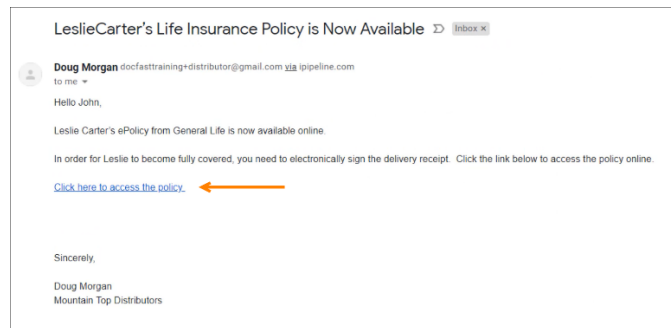
Log Into DocFast for First e-Delivery

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.



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.

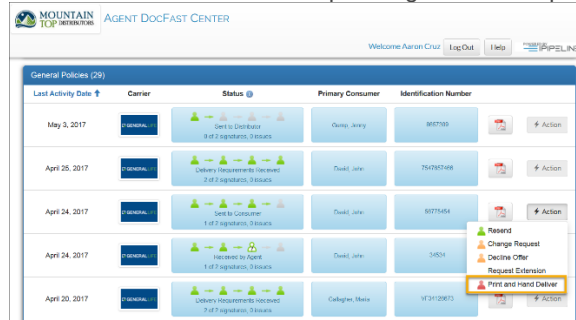
The screenshot shows a registration form with a confirmation pop-up window. The pop-up window says "Congratulations John, you have successfully created your DocFast account!" and displays "Your username is: jtaylor12245" with a blue "Log In" button. The registration form below has three security questions: "What is your mother's me" (Answer: Williams), "What was the name of yc" (Answer: Kings), and "What city you were born i" (Answer: Houston). At the bottom of the form is a blue "Create Account" button and a link "Already have an account? Log In". Orange arrows point to the "Log In" button and the "Create Account" button.

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.

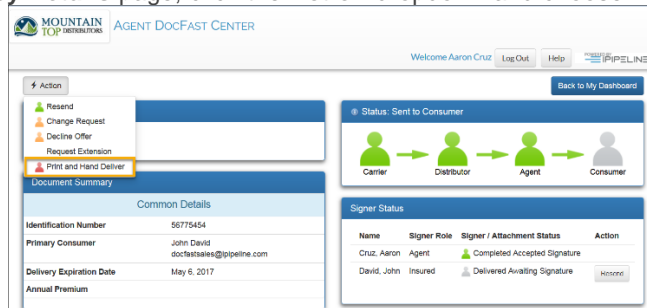


Option 2

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

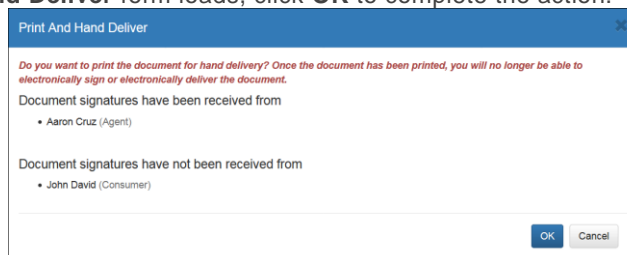


2. From the **Policy Details** page, click the **Action** dropdown and choose **Print and Hand Deliver**.



Print and Hand Deliver

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



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**.

The screenshot shows a table of policy activities. The 'Details' popup for the policy dated March 7, 2018, is open, displaying the following information:

- Latest Activity: March 14, 2018
- Status: Received by Distributor
- Delivery Exp. Date: April 30, 2018
- Distributor: Mountain Top Distributors
- Case Manager: Jones, Donald
- Agent: Cruz, Aaron
- Policy Number: Demo

The 'More Details' button at the bottom of the popup is highlighted with a yellow arrow.

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**.

The screenshot shows the 'Status: Received by Distributor' section. It displays a flow diagram with four stages: Carrier, Distributor, Agent, and Consumer. Below the diagram is a table with the following data:

Name	Role	Status	Action
Cruz, Aaron	Agent	Delivered Awaiting Signature	
Ball, Lucille	Insured	Not Sent	

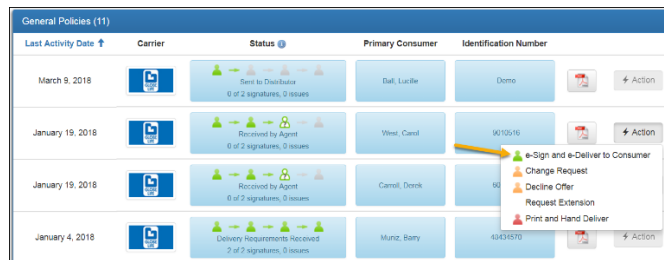
Agent: e-Deliver the Document to the Consumer

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.

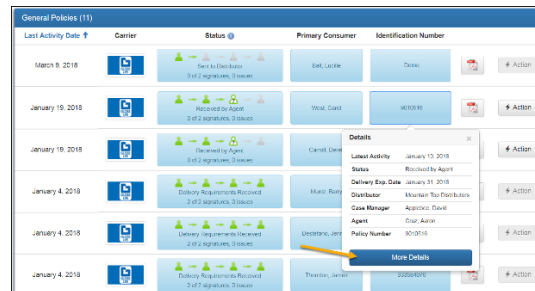
Option 1

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

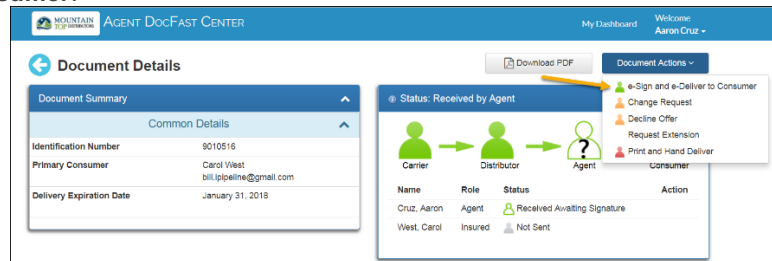


Option 2

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



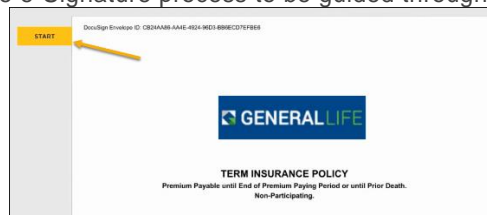
2. From the **Policy Details** page, click the **Document Actions** dropdown and choose **e-Sign and e-Deliver to Consumer**.



-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.

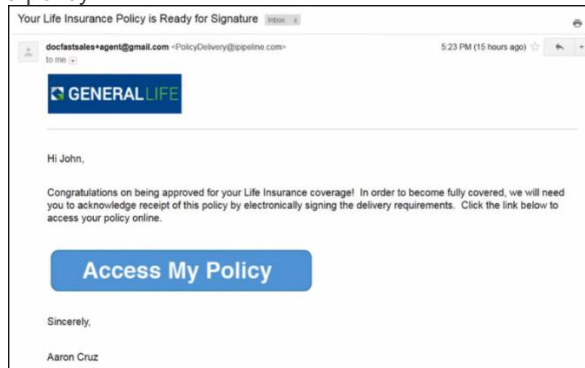
e-Deliver the Document to the Consumer

1. Enter your client's name and email at the top of the **Consumer Signature** form.
2. To include a custom message, add text into the **Custom Text** field.
3. 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 green and the **Signer Status** section has updated to display the Agent as **Completed Accepted Signature**.

Name	Signer Role	Signer / Attachment Status	Action
Cruz, Aaron	Agent	Completed Accepted Signature	
David, John	Insured	Delivered Awaiting Signature	<input type="button" value="Resend"/>

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.



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.



Status: Delivery Requirements Received

Carrier → Distributor → Agent → Consumer

Signer Status

Name	Signer Role	Signer / Attachment Status	Action
Cruz, Aaron	Agent	 Completed Accepted Signature	
David, John	Insured	 Completed Accepted Signature	

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.

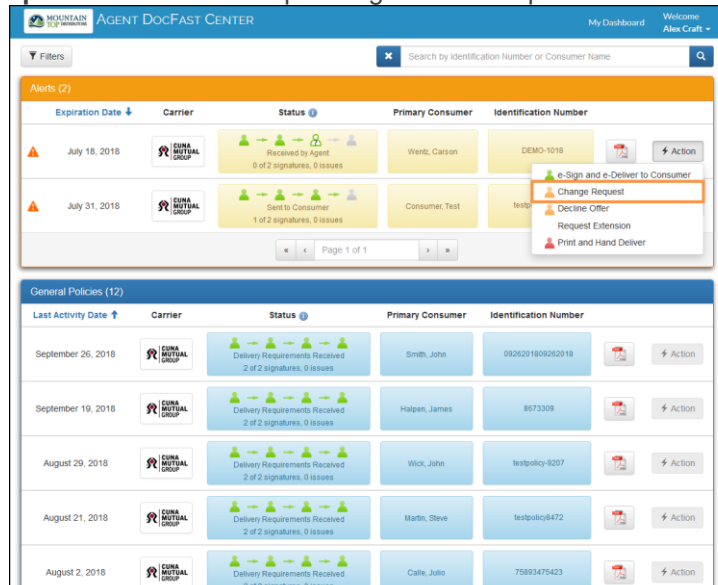
Submit a Change Request in DocFast

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.

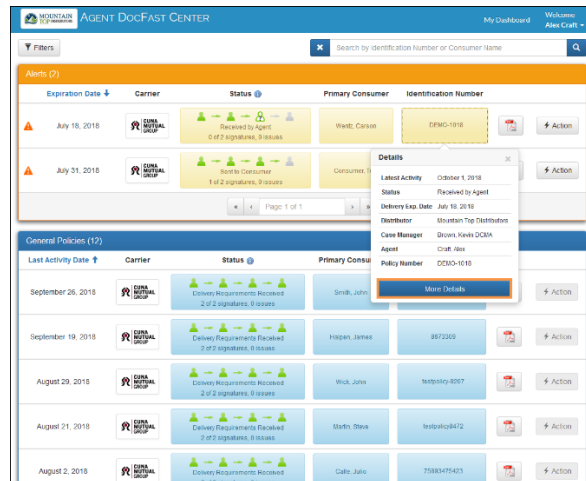
Option 1

1. Select **Change Request** from the corresponding **Action** dropdown.

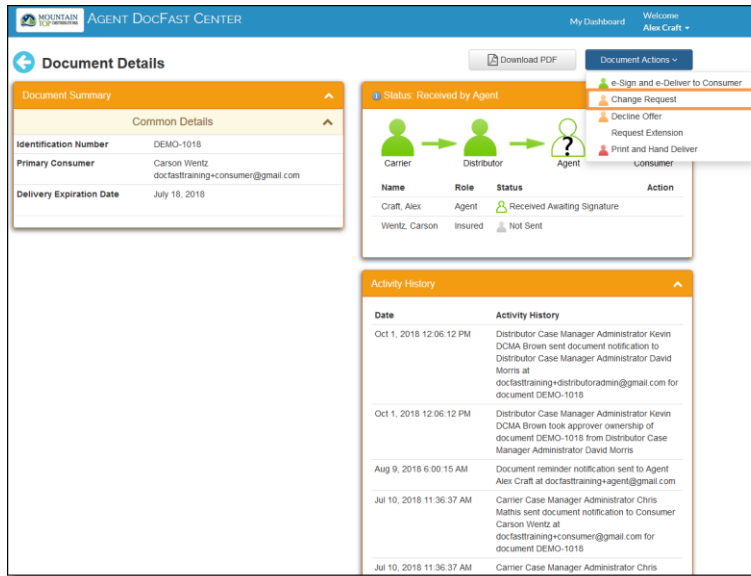


Option 2

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



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



Submit the Change Request

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.

The screenshot shows a 'Change Request' form with a 'Reason' dropdown set to 'Update to Beneficiary' and a 'Description' field containing the text 'Beneficiary needs to be updated to consumer's son, Ryan David.' The form also includes an 'Add another reason' button, a 'Submit' button, and a 'Cancel' button.

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

The screenshot shows the 'Change Request' form with two entries. The first entry has 'Reason: Update to Beneficiary' and 'Description: Beneficiary needs to be updated to consumer's son, Ryan David.' The second entry has 'Reason: Update to Policy effective date' and 'Description: Policy effective date needs to be moved to 1/1/2018'. The form includes an 'Add another reason' button, a 'Submit' button, and a 'Cancel' button.

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.