

Lincoln National Life - eDelivery – Ash /Agent

Setting up User ID and Password

ePolicies issued by Lincoln Financial for Life and MoneyGuard products and by Standard Insurance for Disability policies are handled through the Policy Ex/DocFast platform. Each user will have an individual user name and password to access policies. All Ash Brokerage policies are accessible when logging in to allow for coverage when case managers are out.

Setting up User ID and Password

When you receive your first ePolicy, you and the agent will be prompted with the following steps to set up your User ID and Password. Please keep this information for future use.

- Click on the [Click here to access your policy](#) link in the email notification

New Policy [REDACTED] is available for your approval

To: Connie Ford

LinkedIn + Get more add-its

Hi Connie,

A new Lincoln Financial Group ePolicy has been added to your ePolicy Center.

Policy Number: [REDACTED]
Consumer: [REDACTED]
Delivery Date: 2018-05-02T00:00:00
Premium Amount: \$1,789.50

To access this ePolicy, please visit your ePolicy Center Dashboard:

[Click here to access your policy](#)

Upon review, if changes are needed please select the action of "Change Request" from the action menu on your dashboard. For more information on completing a change request within DocFast, please visit our customer portal at <https://www.customerportal.ipipeline.com/knowledgebase/submitting-a-change-request-in-docfast/>
If you are not the intended recipient, or wish to transfer this policy to another manager in your office, please select transfer ownership for the action menu in the DocFast dashboard. For more information on how to transfer ownership within DocFast, visit the customer portal at <https://www.customerportal.ipipeline.com/knowledgebase/transferring-a-document-to-a-new-distributor-case-manager/>

- Enter in Last Name, Password, Confirm Password, 3 Security Questions and Answers
- Click Register

iPipeline PolicyEX Registration Center

Complete Registration

To create your account and access your dashboard, complete the following information.
If you already have an account login.

Confirm your last name
Password
Confirm Password

Security Questions

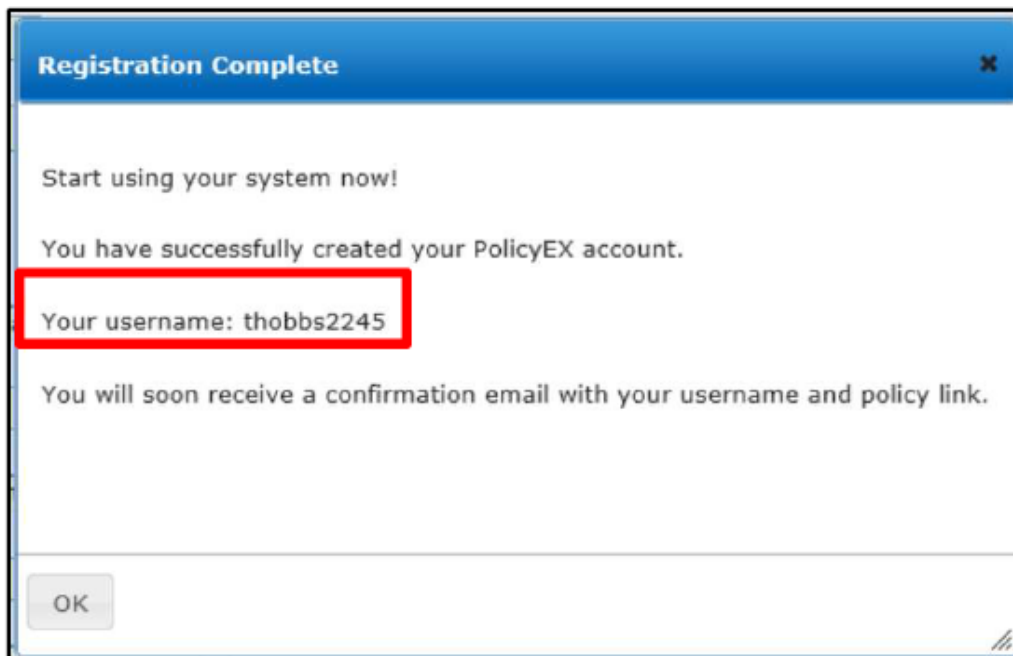
Security Question
--Select one--
Answer

Security Question
--Select one--
Answer

Security Question
--Select one--
Answer

[Register](#)

- Obtain User ID from Registration Confirmation
- Click OK



You will now be able to enter in your **USER ID** and **Password** to access the policy.