

eDelivery Options

Carrier	eDelivery Platform	Process	Notes
American General	Carrier Website	<ul style="list-style-type: none"> New Business Status will reflect "Conditionally Issued" on website Policy should be manually accessed from the ePolicy Delivery section <ul style="list-style-type: none"> Ensure results displayed are accurate and include the date needed Select action "Forward link to policy owner" to release policy to client 	<ul style="list-style-type: none"> PDF copy is also available and acceptable to pull for delivery Select "Request Paper Mailing" for hard copy to be mailed Email address for insured must be on file Insured must be owner/payor No premium check accepted Wet signed policy delivery receipt required in: LA, SD, VW and Foreign Nationals
Banner/William Penn	Carrier DocuSign	<ul style="list-style-type: none"> Email notification forwarded from Life NB Admin email Click link to access policy - enter in Ash GA code Review policy and sign as Ash on behalf of agent Release policy to client 	<ul style="list-style-type: none"> You may log directly into DocuSign to access policy Passcode for client is first 5 letters of last name & last 4 of SSN Email address for insured must be on file Insured must be owner/payor No premium check accepted Policy released to client if no action taken (5 business days)
Lincoln Financial	iPipeline DocFast	<ul style="list-style-type: none"> Email notification from carrier with link to DocFast 	<ul style="list-style-type: none"> You may log directly into DocFast to access policy Ash/Agent can opt out for PDF delivery (removes watermark)
Minnesota Life	Carrier DocuSign	<ul style="list-style-type: none"> Email notification from carrier that policy is available on website Signing status available on pending case status on website 	<ul style="list-style-type: none"> Available only on cases approved through Write Fit Opt in when submitting eApp (can opt out prior to issue) Unable to opt in after eApp submitted eSignature link good for 14 days only Click "Other Actions" then Cancel/Decline to request paper policy
Pacific Life Promise Products	Carrier Website	<ul style="list-style-type: none"> Email notification from carrier that policy is available on website Approve policy to release to agent to sign and release to client 	<ul style="list-style-type: none"> Select "Reissue Requested" for hard copy to be mailed Reissue and delivery extension requests can be submitted on the policy via the website
Principal	Adobe Sign	<ul style="list-style-type: none"> Email to case manager to approve Release to client and then agent to sign 	<ul style="list-style-type: none"> Select "Alternative Action" to request reissue, hard copy or make policy not taken Not available in NY If agent didn't sign, be sure to forward policy/delivery requirements
Protective	Carrier Website	<ul style="list-style-type: none"> Email notification from carrier that policy is available on website Policy should be manually accessed from Electronic Policy section Approve policy to release to agent to sign and release to client 	<ul style="list-style-type: none"> Select "Request Change" and chose Email address for insured must be on file Insured must be owner/payor Not available on VUL, trust owned or 1035 exchange Policy automatically released to agent and/or client if no action taken (2 business days) Policy mailed to agent is client doesn't accept within 2 weeks – eDelivery voided
Prudential	iPipeline DocFast	<ul style="list-style-type: none"> Email notification from carrier with link to DocFast 	<ul style="list-style-type: none"> You may log directly into DocFast to access policy eDelivery is opted in up front, you must "decline" for hard copy – NOT able to deliver PDF If companion cases, they will be marked for paper delivery unless you confirm prior to issue Mode change requires reissue, you must "decline" and request reissue
SBLI	Carrier DocuSign	<ul style="list-style-type: none"> Email notification to Owner/Insured and Ash once policy issued 	<ul style="list-style-type: none"> Ash/Agent have no action items during eDelv process unless changes requested Copy of policy is available on SBLI's website – download copy into PaperClip Ash and Agent will not sign anything – all client driven Send a PDF copy of the policy to the agent.
Transamerica	Carrier DocuSign	<ul style="list-style-type: none"> Email notification from carrier that policy was e-delivered to client Status can be found on carrier website 	<ul style="list-style-type: none"> eSign link is good for 15 days Email address for the insured and/or policy owner must be on file Passcode for client is the last 4 of SSN Unable to obtain copies of the policy or delivery requirements Only available if policy delivery receipt and/or premium are only requirements Premium must be on file or bank info provided on application to draft

NOTE: Ash has opted to default eDelivery options for the above carriers when available as our preferred method of policy delivery. We should promote eDelivery when appropriate but understand in some circumstances it is not the preferred method. Each process above has been documented individually and the procedures are located on Ash Net under the eSolutions Tab in the eDelivery folder at the following link: <http://ashnet/eSolutions/eDelivery>