

What is iGO e-App?

iGO e-App is an intelligent fillable form with carrier specific rules embedded. It enables you to electronically complete and process 100% in Good Order applications. It also improves your productivity so you can sell more insurance.

What are the key features for iGO e-App?

- **NEW!** Quick and easy access to start a new case or view all existing cases
- Rapidly access Carrier, Product Type, Product & State selection-driven Screens / Forms
- Easy-to-use, intelligent wizard Screens—required & optional fields, validation & business rules
- Green “Completed” Checkmarks upon in Good Order determination
- View / print filled complete or incomplete forms at any time
- SAVE and UPDATE as many times as you like
- Print & wet sign feature to match your selling style at the point of sale
- Electronic signature & submission

What are the key benefits for iGO e-App?

- Get your application done right the first time!
- Trim 10-14 days after client signature to speed processing and sell 25% more.
- Get paid faster!
- Go Paperless and save on time, paper, gas and postage costs.
- Improve the consumer experience!

How do I register for a username and password?

Registering for a username and password is simple! All you have to do is fill in some basic information about yourself and answer a few security questions. As soon as you submit your form, an email is automatically sent to you with your username and a hyperlink for you to set up your password.

How do I get trained to use iGO e-App?

All training materials, including videos, product collateral, a list of frequently asked questions, and iPipeline’s iGO e-App Support phone number and email address can be found at:

<http://training.ipipeline.com/>

In addition, trainings are held via WebEx and Teleconference every Tuesday and Thursday from 3:00 - 4:00 pm EST. To register, go to:

<http://www.ipipeline.com/iGo/iGO-demo-reg.php>

How do I access iGO e-App?

There are 3 way to access the iGO e-App.

On your distributor Web Site, you will see an iGO e-App banner. This will allow you to view a demo, login or register for a username and password.

1. At the Forms Engine, you will notice another access point.
Our Term Quote Engine now integrates with the iGO e-App. An additional feature you will see in the Quote Engine’s Profile Page is the ability to customize your view to run quotes for iGO e-App carriers only.
2. By viewing the results page, you will notice the green iGO e-App button. Selecting the button, your client’s information will be pulled from the Quote Engine and populated throughout the carrier application of your choice.

What tools do I need on my computer?

Browser Compatibility:

IE 6 & up

Bandwidth:

High-speed Internet Connection

System Requirements:

System requires browser;
Adobe Reader version 6 or higher;
Do not have 3rd party cookies & popups blocked

Hardware Requirements:

Any standard operating system

What do the visual cues within the iGO e-App mean?

There are 4 main visual cues used within the iGO e-App:

1. If you type the information in right within the e-Application, we will turn the respective **FIELD FROM YELLOW TO WHITE**.
2. A **RED QUESTION MARK** underneath a particular section, points out that you have made a mistake and that you eventually need to come back and fix it.
3. A **GREEN CHECKMARK** lets you know that a section is filled out correctly.
4. A **GOLD STAR** indicates that your application is in 100% good order.

Yellow Highlighted Field

White Corrected Field

This screenshot shows the 'Validate and Lock Data' screen of the iGO e-App. The form contains fields for Client information, Primary Insured (First Name, Middle Initial, Last Name, Suffix), Resident Address (Street, City, State, Zip), Birth Date, Gender, Social Security #, Phone Preference, and Preferred Contact Number. Several of these fields are highlighted in yellow, indicating they have not been filled out correctly. A red question mark is visible in the left-hand navigation menu, indicating an error.

Red Question Mark

This screenshot shows the same 'Validate and Lock Data' screen as the previous one, but with the yellow highlighted fields now white, indicating they have been corrected. A green checkmark is visible in the left-hand navigation menu, indicating that the application is now in good order.

Green Checkmark

This screenshot shows the 'Validate and Lock Data' screen with a gold star icon and a message indicating the application is complete. The message reads: 'In Good Order - Congratulations, your application is complete! You now qualify for our Electronic Signature process. Please click View Form at the top of this page to review your application then click the button below to lock the application and proceed to the signature process. If you need to edit the application before locking, you may do so by going back to any screens on the left navigation tree, then come back here to the validate and Lock Data screen using the same navigation tree. Once the application is locked, no changes can be made without unlocking the application. Thank you for using our Electronic Application!' A gold star icon is visible in the left-hand navigation menu.

Gold Star

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