

# MAKING BUSINESS EASIER

TRANSAMERICA SELLING EXPERIENCE: SAVE TIME WITH DOCUSIGN® AND POLICY eDELIVERY

For Agent Use Only. Not for Public Distribution.



TRANSAMERICA®



# WHAT WE'LL COVER

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- The Benefits of Policy eDelivery
- Your eDelivery Step List
- iGO® e-App Opt-in Process
- DocFast®:  
Notifications, Setup, and Required Actions

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# IMPORTANT INFORMATION FOR THE PRESENTER

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# BENEFITS OF eDELIVERY

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**EASY** ✓ ● ● ● Simple opt-in within the iGO<sup>®</sup> e-App

**CONVENIENT** ✓ ● ● ● Electronically sign documents 24/7 with DocuSign (this includes illustrations)

**FAST** ✓ ● ● ● Policy documents arrive in your inbox as soon as they're complete

**SECURE** ✓ ● ● ● Fully encrypted technology protects clients' personal information

**UP TO DATE** ✓ ● ● ● Know the status of a policy at any time throughout the process

**CONTROL** ✓ ● ● ● Retain the ability to review the policy, before sharing with your client

# eDELIVERY AVAILABILITY AND CAPABILITY

	FEATURES
<b>Application Types</b>	iGO e-App and paper
<b>Risk Classes</b>	All risk classes
<b>Riders</b>	All riders
<b>Case Requirements Eligible for eDelivery*</b>	Amendment Statement of Good Health Amendment to Save Age Policy delivery receipts Illustrations Notice to agents coinciding on or before customer receipt
<b>Agent Notification of eDelivery</b>	Case status on agent portal and emails to agents when policy is ready for their approval from DocFast®
<b>Agent Access to eDelivered Policy</b>	View and download via DocFast

\* Reissues and any pre-issue requirements that are granted an exception to obtain on delivery are ineligible for eDelivery.

# HOW POLICY eDELIVERY WORKS

1-20 Calendar Days

## YOUR STEPS

## CLIENT STEPS

- 1 Opt in through the iGO® eApp
- 2 Submit the application
- 3 Receive an email to view & approve policy\*
- 4 Create a Transamerica DocFast\* account
- 5 Approve the policy and send to your client using the DocFast dashboard
- 6 Client receives an email to access their policy
- 7 Client accepts & signs policy documents in DocuSign

You're notified when the client views and signs their documents

\* First-time users must create a Transamerica account, even if they already have a DocFast account through another carrier.



# eDELIVERY TIMELINE

All eDelivery email notifications are sent to the policy owner and agent listed to receive communications.



The first time an agent receives an eDelivery notification email, they will be prompted to create a **Transamerica DocFast® account for their Transamerica policies. This applies even if they already use DocFast through another carrier — a NEW DocFast account needs to be created through Transamerica.**

**Note:** *DocFast is the policy eDelivery platform provided by iPipeline®.*

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# OPT-IN PROCESS USING iGO E-APP

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# eDELIVERY AVAILABILITY AND CAPABILITY

- eDelivery step is listed within the iGO® e-App
- Select “Yes” if the client wishes to opt in for eDelivery
- Click the button labeled “eDelivery Terms and Conditions of Use”

The screenshot displays the 'Application' tab of the iGO e-App. On the left is a navigation menu with various steps, most marked with a green checkmark. The 'eDelivery/Conditional ...' step is highlighted with a red question mark. The main content area is titled 'eDelivery / Conditional Receipt' and contains the following elements:

- A question: "If eligible, do you prefer to receive your policy documents electronically?" with radio buttons for 'Yes' (selected) and 'No'.
- Text: "Please read the eDelivery Terms and Conditions of Use by clicking on the button below. You should print and retain a copy of this document for future reference."
- Text: "After reading this document, please check the box indicating you have read it and agree to the terms and conditions described in it."
- A button labeled "eDelivery Terms and Conditions of Use".
- A checkbox with the text: "By checking this box, I consent to receive electronic transmission of documents and agree to the terms and conditions as described in the eDelivery Terms and Conditions of Use document."
- A field for "Owner email address for policy delivery" containing "test@test.com".
- A blue information box: "This is the email address that will receive the policy electronically. To enter or change the email address listed here, please return to prior screens to complete Owner E-Mail field."
- A section titled "Conditional Receipt" with the question: "Are you collecting any money with this application? This includes Electronic Bank Draft payment method for the initial premium." and radio buttons for 'Yes' and 'No' (selected).

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# eDELIVERY ELIGIBILITY

If your case is ineligible for eDelivery, this question defaults to No

## CASES THAT ARE NOT ELIGIBLE FOR eDELIVERY

- New York, Guam, Puerto Rico, or Virgin Islands
- Nonperson owner types, such as organizations and trusts, or multiple owners
- Insured or owner is not a U.S. resident or citizen
- **Insured is a juvenile**
- Insured and/or owner email address is missing
- Insured and/or owner SSN is missing

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Case Information    **Application**

✓ Licensing And Appoint...  
✓ Proposed Insured  
✓ Proposed Insured, Cont...  
✓ Coverage and Riders  
✓ Beneficiaries  
✓ Existing Insurance  
✓ Activities  
✓ Payment  
? eDelivery/Conditional ...  
✓ Medical Questions  
✓ HIV - PI  
? Attachments  
 Agent Report  
 Agent Report, Cont...  
 Application Requirem...  
 Validate and Lock

### eDelivery / Conditional Receipt

If eligible, do you prefer to receive your policy documents electronically?  
 Yes    No

Please read the **eDelivery Terms and Conditions of Use** by clicking on the button below. You should print and retain a copy of this document for future reference.

After reading this document, please check the box indicating you have read it and agree to the terms and conditions described in it.

[eDelivery Terms and Conditions of Use](#)

By checking this box, I consent to receive electronic transmission of documents and agree to the terms and conditions as described in the eDelivery Terms and Conditions of Use document.

**Owner email address for policy delivery**  
test@test.com

**i** This is the email address that will receive the policy electronically. To enter or change the email address listed here, please return to prior screens to complete Owner E-Mail field.

**Conditional Receipt**

Are you collecting any money with this application? This includes Electronic Bank Draft payment method for the initial premium.  
 Yes    No

# CONSENT TO eDELIVERY

- If the owner consents to eDelivery, check the box in the highlighted text
- The email will pre-fill if an email address has been entered for the owner — if not, enter email address
- **Important:** Carefully review and confirm the email address for the owner
- As part of the iGO e-App signing process, the Consent to Do Business Electronically is signed by all signing parties (policy owner and insured, if different)

The screenshot shows a software interface with two tabs: 'Case Information' and 'Application'. The 'Application' tab is active. On the left is a sidebar with a list of items, each with a green checkmark or a red question mark. The 'eDelivery/Conditional ...' item is highlighted with a red question mark. The main content area is titled 'eDelivery / Conditional Receipt'. It contains the following elements:



- A question: 'If eligible, do you prefer to receive your policy documents electronically?' with radio buttons for 'Yes' (selected) and 'No'.
- Text: 'Please read the eDelivery Terms and Conditions of Use by clicking on the button below. You should print and retain a copy of this document for future reference.'
- Text: 'After reading this document, please check the box indicating you have read it and agree to the terms and conditions described in it.'
- A button labeled 'eDelivery Terms and Conditions of Use'.
- A checkbox with the text: 'By checking this box, I consent to receive electronic transmission of documents and agree to the terms and conditions as described in the eDelivery Terms and Conditions of Use document.'
- A label 'Owner email address for policy delivery' above a text input field containing 'test@test.com'.
- A blue callout box with an information icon and text: 'This is the email address that will receive the policy electronically. To enter or change the email address listed here, please return to prior screens to complete Owner E-Mail field.'
- A section titled 'Conditional Receipt' with the question: 'Are you collecting any money with this application? This includes Electronic Bank Draft payment method for the initial premium.' and radio buttons for 'Yes' and 'No' (selected).

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# REVIEW CONDITIONS OF USE

New window appears with the **eDelivery Terms and Conditions of Use** for your client to review

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	 <small>SECURE   EASY   ENVIRONMENTALLY FRIENDLY</small>
<b>eDelivery Terms and Conditions of Use</b>	
The Transamerica company using this form is:	
<input type="checkbox"/> Transamerica Advisors Life Insurance Company	<input type="checkbox"/> Transamerica Financial Life Insurance Company
<input checked="" type="checkbox"/> Transamerica Life Insurance Company	<input type="checkbox"/> Transamerica Premier Life Insurance Company
<u>As used herein, "the Company", "we", "our", or "us" means the Transamerica company checked above.</u>	
<b>ELECTRONIC INFORMATION CONSENT</b> – I consent to receive documents and notices applicable to the Eligible Policy/Policies accessed through the Company website or portal, or websites or portals operated on behalf of the Company. These include, but are not limited to: Policy contracts, applications, application supplements and addendums, illustrations, amendments, riders, replacement notices, statements of additional information, conditional receipts, customer correspondence, prospectuses, prospectus supplements, annual and semiannual reports, quarterly statements and immediate confirmations, privacy notices, other notices, and documentation, permitted by law to be sent electronically, in electronic format, when available instead of receiving paper copies of these documents by U.S. mail.	
<b>Important Information Concerning Electronic Document Delivery:</b>	
<ul style="list-style-type: none"><li>• Your consent is voluntary. Documents will only be transmitted to you electronically if you consent.</li><li>• There is no charge for electronic delivery, although your internet provider may charge for Internet access.</li><li>• You are confirming that you have access to a computer with internet capabilities and an active email account to receive information electronically.</li><li>• This Electronic Document Delivery applies only to Eligible Policies accessed through the Company website or portal, or websites or portals operated on behalf of the Company.</li><li>• After consenting to Electronic Document Delivery, we will send an email to confirm that the email address you provided is correct. If we are unable to confirm an email address or have reasonable suspicion that an email address is incorrect, we will not activate the consent for electronic delivery, in which case you will continue to receive paper copies of your documents.</li><li>• Email filters must be updated to ensure you received email notifications from us.</li><li>• Not all contract documentation and notifications may currently be available in electronic format.</li><li>• You can request the Company provide paper copies of documents at any time for no charge.</li><li>• If an email address changes, you may notify us at any time by contacting us at the phone number listed below or editing your profile on the appropriate website.</li><li>• This consent will remain in effect until revoked. You may opt out of receiving records electronically at any time.</li><li>• If you choose to revoke your consent, withdrawal of this consent will become effective within two business days after the Company receives your request.</li></ul>	
Please call 1-800-852-4678 or visit the Company website at <a href="http://www.transamerica.com">www.transamerica.com</a> if you would like to revoke your consent, wish to receive a paper copy of the information above, or need to update your email address.	
<input type="checkbox"/> By checking this box, I consent to receive electronic transmission of documents and agree to the terms and conditions as described above.	
Policy Owner: <a href="mailto:christine.filmore@transamerica.com">christine.filmore@transamerica.com</a>	<u>Chris Termdemo</u>
Email Address	Printed Name
<b>Policy Number(s):</b>	



# YOUR STREAMLINED PROCESS

Providing an illustration with digital application submission:



## **POLICY APPROVED AS APPLIED**

No illustration delivery requirement, which means faster placement and commissions

**1.**

Run illustration in Transamerica Life Illustrator

**2.**



Select Illustration and Save in Transamerica Life Illustrator

**3.**

Attach to client's iGO<sup>®</sup> e-App

**4.**

Agent and client sign e-App with illustration

# ATTACHING AN ILLUSTRATION

(iGO® e-App)

Case Information Application

Attachments

Please note the following about adding an attachment:  
PDF files only.  
Maximum size including all Attachments is 15MB.

Attach Illustration

Are you providing an illustration with this application?  
 Yes  No

The illustration is:  
 Already signed  Will be signed with the application

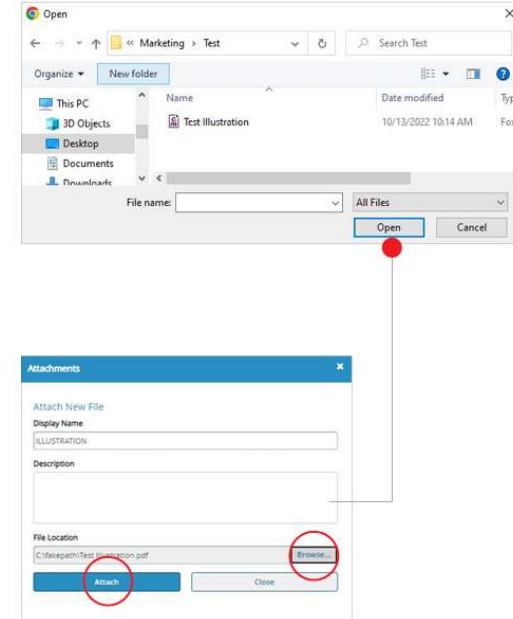
Attach Illustration Delete Illustration

Attach Document

Is there a document that needs to be added to this transaction?  
 Yes  No

Attach File Delete File

Back Next



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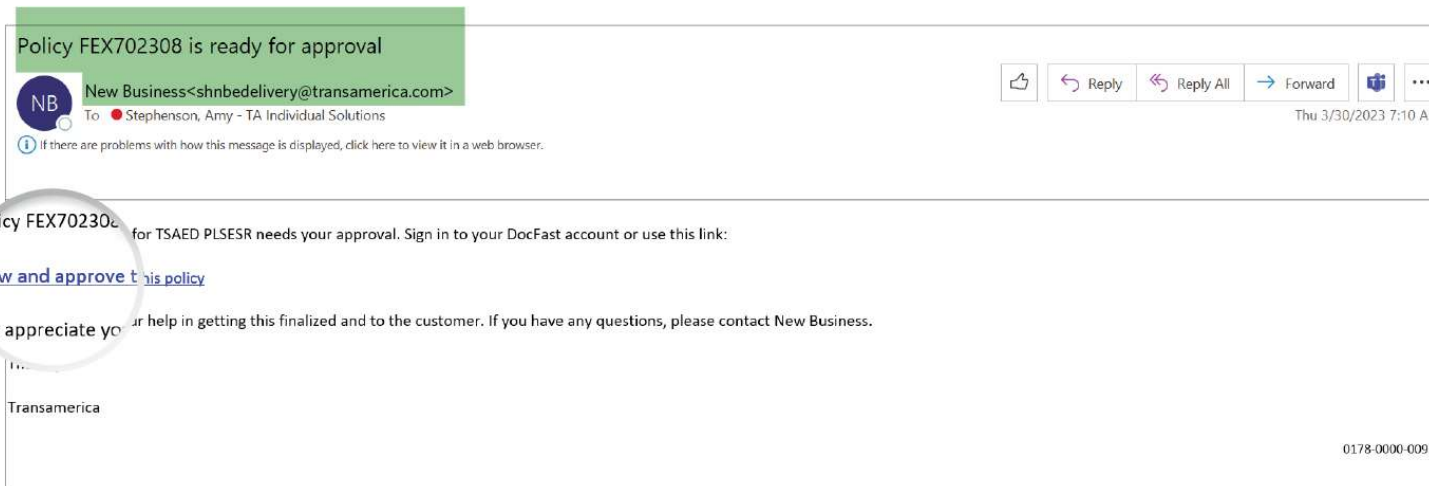
# STEPS FOR YOU AND YOUR CLIENTS TO ACCEPT eDELIVERED POLICY AND DOCUMENTS

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# INITIAL WFG AGENT NOTIFICATION

- WFG Agents will receive an email notifying them that the policy is ready for approval.
- They will click on the link to log in to DocFast, where they can approve and email the policy to clients to sign.



# FIRST-TIME eDELIVERY USERS

- The first time an agent receives an eDelivery notification email, they will be prompted to create a new DocFast® account for their **TRANSAMERICA** policies, even if they already use Docfast with another carrier
- Agent must complete all fields
- Agents set up on DocFast® can visit [policyexpertportal.ipipeline.com](https://policyexpertportal.ipipeline.com) to log in and view their dashboard
- Watch this step-by-step video guide for how to set up your Transamerica DocFast account for the first time: [https://www.customerportal.ipipeline.com/knowledgebase/logging-into-docfast-for-my-first-e-delivery/#Video\\_Tutorial](https://www.customerportal.ipipeline.com/knowledgebase/logging-into-docfast-for-my-first-e-delivery/#Video_Tutorial)

IPIPELINE  
INSURANCE ACCELERATED

DocFast Account Registration

Help

Hi JENNIFER, we noticed this is your first time accessing DocFast.  
Please create an account below to securely manage and access your documents.

Account Information

Last Name

Password

Confirm Password

Security Questions

Question #1  
--Select one--

Answer

Question #2  
--Select one--

Answer

Question #3  
--Select one--

Answer

Already have an account?

# WFG AGENT DASHBOARD IN DOCFAST

Here are the steps WFG Agents will take to approve and deliver the policy to their clients for eSignature.

## STEP 1:

Click "Document Actions"

**Document Details**

New Document Package This is a new document package for your approval.

**Document Summary**

**Common Details**

Identification Number: 6750074093

Primary Consumer: Policy G Snmmmmtestcases1  
1234 Main St  
Cedar Rapids, IA 52404  
sandy.lawrence@transamerica.com

Delivery Expiration Date: March 26, 2021

**Specific Details**

Agent Name: FITZGERALD, JENNIFER

Face Amount: 150000

Owner last 4 digits of SSN: 9876

Owner: Snmmmmtestcases1, Policy G

Address: 1234 Main St null Cedar Rapids IA 52404

Insured: Snmmmmtestcases1, Policy G

Product Name: Indeterminate Premium

**Status: Received by Agent**

Carrier → Agent → Consumer

Name	Role	Status	Action
FITZGERALD, JENNIFER	Agent	Delivered Awaiting Signature	
Snmmmmtestcases1, Policy G	Owner	Not Sent	

**Activity History**

Date	Activity History
Mar 11, 2021 5:24:56 AM	Carrier Case Manager Administrator New Business sent document notification to Agent JENNIFER FITZGERALD at Valerie.Ramirez2@transamerica.com f or document 6750074093
Mar 11, 2021 5:24:47 AM	Document created

## STEP 2:

Click "e-Sign and e-Deliver to Consumer"

eSign and eDeliver to Consumer

Change Request

Decline Offer

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# WFG AGENT DASHBOARD IN DOCFAST

... continued

Next, you will be prompted to review the documents.

**STEP 3:**  
Click "CONTINUE"

Please Review & Act on These Documents

TRANSAMERICA  
Powered by DocuSign

Policy Documents were submitted from PolicyEX.IPipeline.com

Please review the documents below. CONTINUE OTHER ACTIONS ▾

Policy Number:	FEX702465
Form:	PWL10
Issue Date:	04/12/2023
Application State:	AL

MODEL

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# WFG AGENT DASHBOARD IN DOCFAST

... continued

## STEP 4:

Click "Policy Accepted" button on each form and then click "FINISH"

The screenshot displays the DocuSign interface. At the top, a red navigation bar contains a 'FINISH' button and an 'OTHER ACTIONS' dropdown menu. Below this is a search bar with three icons. The main content area features a 'NEXT' button on the left and a document preview on the right. A magnifying glass highlights a 'Policy Accepted' button on the document preview. The document text includes: 'DEMONSTRATION ONLY', 'ONLINE SIGNING SERVICE', 'eScribe • Washington 98104 • (206) 219-0200', and 'www.docuSign.com'. Below the document preview, the following information is displayed:

Policy Number:	6750074093
Plan Name:	Super Trendsetter 15 Yr Level
Process Date:	March 09, 2021
Application State:	Iowa

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# WFG AGENT DASHBOARD IN DOCFAST

... continued

## STEP 5:

Forward the packet to the customer's email for review and signature, then click "Continue"

**NOTE:** You cannot change the email address provided by client

Send Document

Please select a signing method for each consumer below, then click 'Continue'

**OWNER**

First Name: Policy G

Last Name: Snmmttestcasesl

E-mail Address: sandy.lawrence@transamerica.com

Signing Meth:

Email  Face To Face

Continue Cancel

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# WFG AGENT DASHBOARD IN DOCFAST

... continued

## STEP 6:

Click "Send e-mail"

Loading...

Send e-mail notification for eSignature to individual(s)

**From** JENNIFER FITZGERALD <Valerie.Ramirez@transamerica.com>

**To** Beef Gravy <SANDY.LAWRENCE@transamerica.com>

**CC**

**BCC**

**Subject** Your insurance policy is ready

# CLIENT eDELIVERY NOTIFICATION

- eDelivery email notification will be sent to the policy owner's email from: **shnbedelivery@transamerica.com**
- The sender will show as **the agent's name**, in this example, ERIC HAHN
- Subject Line: **Your insurance policy is ready**
- Tell your client to check their junk or SPAM folders to verify email receipt
- If client is unable to locate eDelivery email, the agent can log back into DocFast and resend by going into the document actions and clicking Resend

Your insurance policy is ready



ERIC HAHN shnbedelivery@transamerica.com

To • Stephenson, Amy - TA Individual Solutions



Hi OWNEIGHTYEIGHT,

Good news — your life insurance policy FEX702227 is now available online!

Once you log in, you may be asked to sign forms that will allow you to receive the policy documents electronically. In certain circumstances, you may also be directed to sign other documents relating to this policy. These include, but are not limited to, amendments and delivery receipts.

You can find your policy here:

[Access Your Policy](#)

Your agent's available to answer any questions about your policy.

Thanks for being a valued customer!

Thanks

Transamerica

# CLIENT eDELIVERY REVIEW AND ACCEPTANCE

- Client enters last four digits of SSN to review and electronically sign the policy

**Welcome!** Your insurance document is available for review. To ensure your information remains secure and confidential, please answer the question(s) below:

What are the last four digits of your SSN?

[Continue](#)

**Review and eSign Your Document**

Please click on the button below to review your Document. If you need to change or update any information, or if you have any questions, please contact your agent.

If you are satisfied with the information contained within the Document, please eSign your Document wherever it is indicated that an eSignature is required.

[Review and eSign Your Document](#)

# NO POLICY DELIVERY REQUIREMENTS

- If the policy does NOT need a Policy Delivery Receipt, the client will be provided a DocuSign link to accept the policy
- Clicking the “Policy Accepted” button acknowledges policy receipt

DocuSign Envelope ID: [REDACTED]

START

DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200  
www.docusign.com

Your signature is not required,  
review the policy and click the  
accept button when complete.

Policy Accepted

MODEL

Policy Number: [REDACTED]

Plan Name: Super Trendsetter 25 Yr. Level

Process Date: June 12, 2017

Application State: District of Columbia

# POLICY DELIVERY REQUIREMENTS

- Any policy requiring signed policy delivery requirements will be signed by owner via DocuSign
- No agent signature needed
- Signed form is electronically sent back to Transamerica, and policy is placed in force

Please review the documents below.

FINISH OTHER ACTIONS ▾

START

DocuSign Envelope ID: [redacted]

DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200  
www.docuSign.com

Policy Number: [redacted]

Plan Name: Trendsetter LB 15 Yr. Level

Process Date: June 16, 2017

Application State: Pennsylvania



**AGENT WILL BE NOTIFIED WHEN CLIENT LOGS IN AND VIEWS POLICY SUCCESSFULLY**

Policy FEX702465 for TWENTYONE SNMMMMTESTCASEAMY: Consumer successfully logged into portal

TS TWENTYONE SNMMMMTESTCASEAMY shnbedelivery@transamerica.com  
To Stephenson, Amy - TA Individual Solutions

Reply Reply All Forward

Thu 4/13/2023 8:19 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

Dear ERIC HAHN,

This notification is being sent to inform you that the consumer, TWENTYONE SNMMMMTESTCASEAMY, has successfully logged into the DocFast Consumer Portal to view policy FEX702465.

Thanks,

Transamerica

0178-0000-0090

Please do not forward this email to anyone. The contents of this message and any related documents or web links are intended only for the use of the person to which they are addressed and may contain confidential and/or privileged information. Any distribution, or copying of this message, or any attachment, is prohibited.

## AGENT NOTIFICATION EMAIL WHEN CLIENT SUCCESSFULLY APPROVES AND SIGNS

Policy FEX702465 was approved and signed

TS TWENTYONE SNMMMMTESTCASEAMY shnbedelivery@transamerica.com  
To Stephenson, Amy - TA Individual Solutions

Thu 4/13/2023 8:21 AM

Reply Reply All Forward

If there are problems with how this message is displayed, click here to view it in a web browser.

TWENTYONE SNMMMMTESTCASEAMY approved and signed policy FEX702465. The policy status is now Delivery Requirements Received.

Here's the status of all signers:

**Agent: ERIC HAHN: Completed Accepted Signature**  
**Consumer: TWENTYONE SNMMMMTESTCASEAMY: Completed Accepted Signature**

Thanks,

Transamerica


0178-0000-0105

Please do not forward this email to anyone. The contents of this message and any related documents or web links are intended only for the use of the person to which they are addressed and may contain confidential and/or privileged information. Any distribution, or copying of this message, or any attachment, is prohibited.

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# THANK YOU!

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