

iGO[®] e-APP

FREQUENTLY ASKED QUESTIONS

iGO ACCESS AND SYSTEM REQUIREMENTS

HOW DO I ACCESS THE TRANSAMERICA PREMIER iGO E-APP LINK?

Log on to the **Agent Portal**. Click **Sales Tools > E-APP > Launch E-APP**. Click on **Click here to continue** and the iGO screen will be displayed allowing you to start a new case or view existing cases.

WHAT ARE THE SYSTEM REQUIREMENTS TO USE iGO?

- > Web Browsers Supported: Internet Explorer 9*, 10*, 11 (IE 7 is not compatible), Microsoft Edge, Firefox, Apple Safari (for MAC), Google Chrome.
- > Connected Device Support: iGO continues to support the iPad[®] running a supported version of iOS and Safari. iGO supports Tablet signatures running the Google Chrome Browser. Internet Explorer, Edge and Firefox are currently NOT working for Tablet signatures. Tablets are working if you would like to use the Voice and Click Wrap signature processes
- > Bandwidth: For optimal performance, you should have high-speed Internet. Connection with a minimum of 3MB Downstream and 1.5 Upstream.
- > Hardware Requirements: Any standard operating system; Adobe Reader version 8 and higher.

APPOINTMENT AND PRODUCT INFORMATION

DO I NEED TO BE APPOINTED IN ORDER TO SUBMIT TRANSAMERICA PREMIER BUSINESS?

Yes, you must be appointed in the application state with Transamerica Premier Life Insurance Company (TPLIC) to submit business through iGO. Your commission advance could be delayed and/or business may be returned if you are not properly appointed.

WHAT PRODUCTS ARE AVAILABLE ON iGO?

Currently we offer Medicare Supplement.

** Please be aware that Microsoft's support policy for Internet Explorer has changed. Microsoft will no longer be issuing bug and security fixes for certain combinations of Operating Systems and Browsers as of January 12th, 2016. It is our policy to support Browser and Operating system combinations supported by the manufacturer, therefore while we will continue to test the Next Gen UI on IE 9 & 10, we cannot guarantee continued full support for those browser versions going forward.*

SIGNATURE METHODS

WHAT SIGNATURE PROCESSES ARE AVAILABLE WITH iGO?

- > Apply e-Signature using an iPad
- > Send e-mail to client(s) requesting e-Signature (aka Click Wrap)
- > Voice Signature
- > Apply a wet signature to paper forms after completing the e-App

WHAT IS A WET SIGNATURE?

A wet signature is an original signature applied to paper forms. After completing the application within iGO, print the forms so the client(s) can apply “Wet Signatures”.

WHAT IS THE NEXT STEP AFTER A WET SIGNATURE IS OBTAINED FROM THE CUSTOMER?

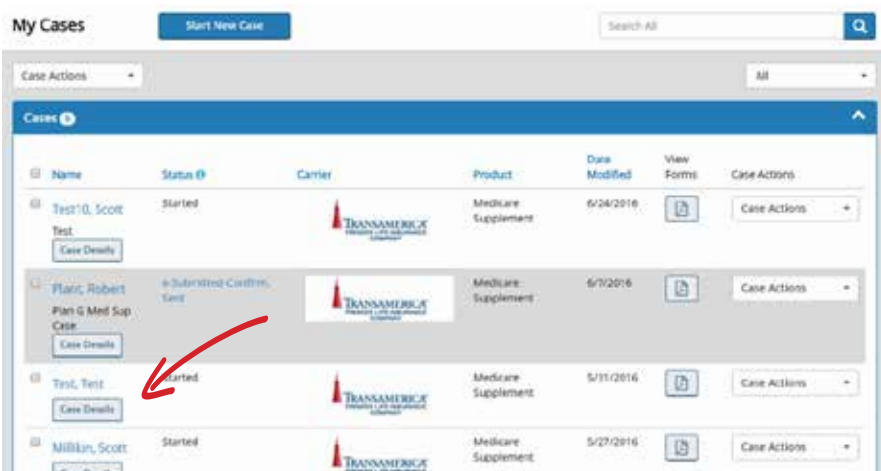
You will then need to fax (866-834-0437) the application to New Business.

RESENDING iGO SIGNATURE EMAILS



When you login to any of our iGO Online systems the first page they will see is the one shown to the left:

In order for you to resend the signature emails the agent will need to click on **View My Cases** on this page.



The Next page to load will be similar to the one to the left. This page will display all the Agent's recent cases.

Click on the **Case Details** link for the Client that you would like to resend the signature emails to.

Case Details

Case Summary:

Case Description: Plan G Med Sup Case
 Insured Name: Mr Robert Plant
 Insured Date of Birth: 01/10/1944
 Carrier: Transamerica Premier Life Insurance Company
 Product Name: Medicare Supplement
 State: MI
 Product Type: Medicare Supplement

e-Signer Status:

Consumer	Role	PIN/TIN/SSN	e-Signature Status	Action
Mr Robert Plant	Applicant	8856	e-Submitted - Confirm. Sent	Resend

Activity History:

- 6/7/2016 8:40 AM Case e-Submitted
- 6/7/2016 8:40 AM e-Signature email notification sent to Mr Robert Plant

Next you will see a page similar to the one to the left. The Agent needs to click on the light blue **Resend** button for the signer that needs to receive a new email.

Note: ONLY the signatures that are currently in progress are listed. You will not be listed to resend until all the client signatures are finished.

Custom Text:

Resend Email Cancel

After clicking on the **Resend** button, you will then see a window open similar to the one shown to the left.

You can change the email address and add Custom Text to be sent to the Client. When they are finished they just need to click the **Resend Email** button to finish.

e-Signature notification email has been sent to the following people:

- [Redacted Email Address]

Close

You should then see a window similar to the one to the left. This screen is just for verification, and will list each email receiving the resent signature email. You just need to click **Close** and are done.

MY CASES SCREEN IN iGO

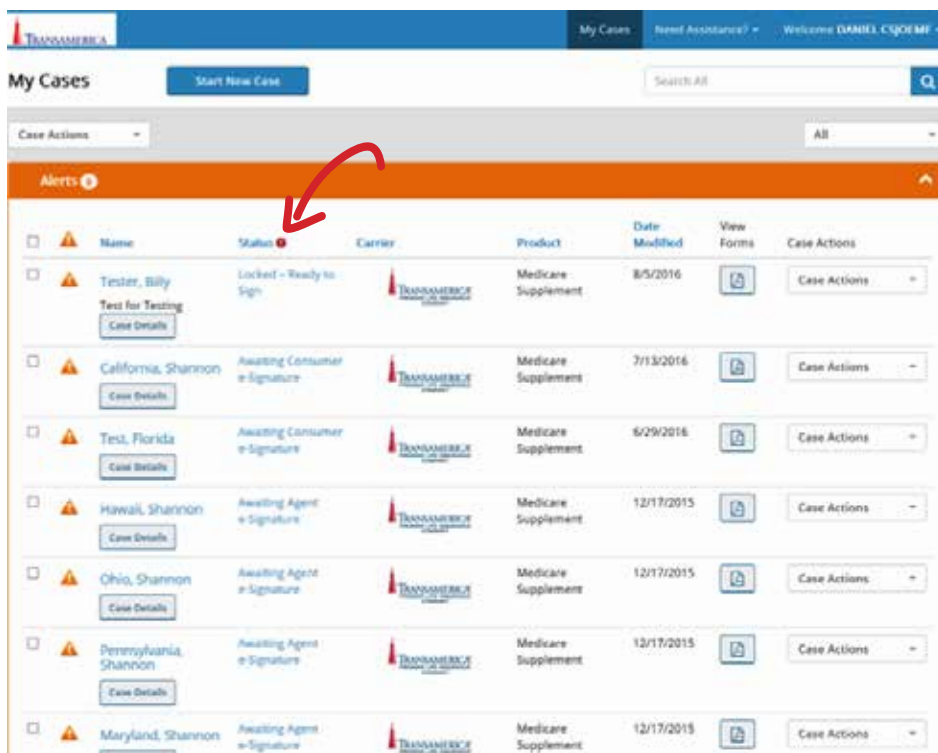
CAN I START A NEW CASE WHEN I AM ON THE MY CASES DASHBOARD?

Yes, click on the Start New Case button at the top of the Cases section (just below Alerts if you have any).

HOW DO I CHECK THE STATUS OF AN APPLICATION (i.e. PENDING, PENDING AGENT SIG, COMPLETED, EXPIRED) FROM THE MY CASES DASHBOARD?

The **My Cases** dashboard contains all of your iGO cases that are less than 120 days old. You may also limit the cases that appear on the **My Cases** screen by choosing a selection under **Display Cases With Activity In:** the last 7 days, the last 30 days or the last 90 days. Follow these steps to get to the **My Cases** dashboard:

- > Click the **View My Cases** and find the application row for the client record, either in the Alert section or the Cases section.
- > The status is listed on each row.
- > A description of each Status can be found by clicking on the red “i” next to the word Status on the top row.



HOW DO I PRINT OFF A COPY OF MY APPLICATION?

- > Find the appropriate case on the **My Cases** dashboard. Click on the PDF icon on the application row below.

MISCELLANEOUS iGO QUESTIONS

DOES EVERY FIELD WITHIN iGO NEED TO BE COMPLETED?

Every field that is highlighted in yellow is considered a required field. The navigation tree on the left side of the screen will indicate a green check mark for each iGO screen that is considered to be In Good Order. A red question mark will appear in the navigation tree indicating the screens that require additional information.

ARE CREDIT CARD PAYMENTS AVAILABLE WITH iGO?

No, not at this time.

WHAT CAN I DO IF THE BANK ROUTING NUMBER AND/OR ACCOUNT NUMBER CANNOT BE VERIFIED?

Verify with the client that the routing and account number are correct. Upon doing so, enter that information into the EFT section and proceed.

WHEN WILL THE INITIAL PREMIUM BANK DRAFT BE TAKEN FROM MY CLIENT'S BANK ACCOUNT?

The initial premium payment will be deducted upon underwriting approval.

I COLLECTED A PHYSICAL CHECK FOR THE CASH WITH APPLICATION (CWA). WHY CAN'T I SUBMIT THE APPLICATION ELECTRONICALLY?

If you collect a physical check, the program will not allow you to complete the signatures electronically. You must select Print/Wet Sign, print the application and forms, get them signed, and submit the application along with the physical check. There is a reminder message on the screen if you select Physical Check.

WHERE ARE THE AGENT'S COMMENTS RECORDED?

The Agents Remarks screen will appear just before the **Validate and Lock** screen. There is a free-form section for your remarks.

IF THERE IS A SPLIT AGENT SITUATION, DO BOTH AGENTS HAVE TO BE PRESENT TO SIGN?

No, only the primary writing agent is required to sign.

WHY CAN'T I APPLY SIGNATURES WITHIN THE APPLICATION FORM?

You can only apply electronic signatures when the application is 100% complete and In Good Order and you have locked the application.



IF THE SIGNER DOESN'T LIKE THEIR ELECTRONIC SIGNATURE, CAN IT BE CHANGED?

Yes, there will be a 'Sign' button which they will click to activate the signature box. Once they sign using the iPad, the Sign button will change to Capture. Clicking the Capture button accepts the signature and the button changes back to 'Sign'. The signer can click the 'Sign' button again to clear the current signature and go through the steps again to capture and apply a different signature.

WHY AM I UNABLE TO SUBMIT APPLICATIONS EVEN AFTER SIGNED?

The **Submit to Carrier** button should appear after the Agent signature has been applied. If it does not appear, all questions for the agent have not been completed or the signature has not been applied. Or the application may already have been submitted, in which case you would see a "Thank You" message in place of the **Submit to Carrier** button.

WHAT HAPPENS IF I TRY TO EDIT AN APPLICATION AFTER IT HAS BEEN ELECTRONICALLY SIGNED?

You can unlock an application at any time prior to clicking the **Submit to Carrier** button, however, **unlocking the application will erase all signatures and require the entire signature process to be repeated.**

WHEN USING THE E-MAIL SIGNATURE OPTION (CLICK WRAP), HOW DO I KNOW WHAT PIN TO USE?

The 4 digit e-Signature authentication number is pulled directly from the Social Security Number information entered within the iGO screens. Occasionally, the client's authentication number may vary depending on their e-Signing role. For instance, an individual e-Signing on behalf of a corporation may be required to authenticate using the last 4 digits of the Tax Identification Number. The agent enters his/her own unique four digit PIN, which is entered on the electronic e-Signature screens within iGO.

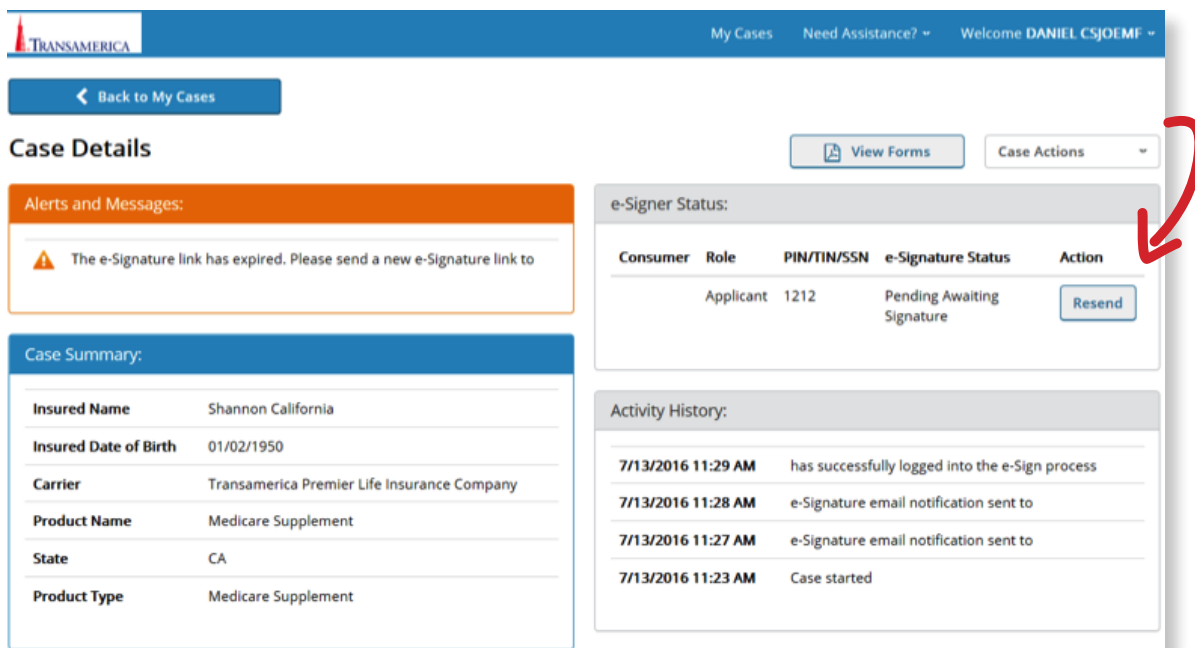


WHAT IF I ENTER THE SSN/PIN INCORRECTLY TOO MANY TIMES?

Consumers and Agents are required to authenticate into the e-Signature process using a unique PIN, TIN or SSN (whichever applicable). Each e-Signer is allotted 3 attempts to accurately enter their information. After 3 unsuccessful attempts, access to the e-Signature process is temporarily disabled requiring action from the agent to resend the e-signature. Follow the steps below to resend the e-signature e-mail:

- > Find the application in the **My Cases** dashboard for the signature you would like to resend.
- > Click the **Case Details** link under the customer name in that row.
- > The e-mail addresses and associated PIN will be displayed on the right side of the **Case Details** screen.
- > Click the **Resend** button next to the customer/agent needing a new link and correct the e-mail address (if necessary) before resending.
- > If the client did not get the e-mail, be sure to have them check their junk or spam e-mail to see if the e-mail inadvertently went there.

If you still have not received the email, please call ipipeline Support at 800-641-6557.



The screenshot shows the Transamerica Case Details page. At the top, there is a navigation bar with the Transamerica logo, "My Cases", "Need Assistance?", and "Welcome DANIEL CSJOEMF". Below the navigation bar is a "Back to My Cases" button. The main content area is titled "Case Details" and includes a "View Forms" button and a "Case Actions" dropdown menu. A red arrow points to the "Case Actions" dropdown menu. Below the "Case Actions" dropdown is a table with the following data:

Consumer	Role	PIN/TIN/SSN	e-Signature Status	Action
	Applicant	1212	Pending Awaiting Signature	Resend

Below the table is an "Activity History" section with the following entries:

- 7/13/2016 11:29 AM has successfully logged into the e-Sign process
- 7/13/2016 11:28 AM e-Signature email notification sent to
- 7/13/2016 11:27 AM e-Signature email notification sent to
- 7/13/2016 11:23 AM Case started

On the left side of the page, there is an "Alerts and Messages" section with a warning icon and the text: "The e-Signature link has expired. Please send a new e-Signature link to". Below this is a "Case Summary" section with the following details:

- Insured Name: Shannon California
- Insured Date of Birth: 01/02/1950
- Carrier: Transamerica Premier Life Insurance Company
- Product Name: Medicare Supplement
- State: CA
- Product Type: Medicare Supplement

WHY IS iGO RUNNING SLOW?

There are various reasons for a slow response time: slow internet connection, multiple iGO tabs open or an inefficient computer system. For wireless users, your distance from the wireless device and location in relation to a cellular tower can affect response time. Using a cabled connection may alleviate speed issues.

WHAT HAPPENS IF MY COMPUTER CRASHES OR I LOSE INTERNET CONNECTION DURING THE PROCESS OF TAKING AN APPLICATION?

As you move from screen to screen, all information is automatically saved. If your computer crashes before moving to the next screen, you will only lose information input on the last screen you visited before your computer crashed or internet connection failed.

CAN I USE AN ANDROID DEVICE WITH iGO?

Android devices have not been tested or certified with iGO at this time.

WHAT NUMBER SHOULD I CALL FOR ASSISTANCE WITH iGO?

- > For issues related to the TA Agent Net Info website, call the Agent Technical Support team at 888-668-0335 option 6.
- > For iGO product questions or assistance filling out applications/forms, contact your Transamerica Sales Support Team.

HOW DO I DISABLE IPAD'S SAFARI POP-UP BLOCKER?

1. To start hit the Home Button on the iPad.
2. Next tap on the Settings icon/ tile.
3. In Settings, you will need to Tap on Safari in the list on the left. You may need to scroll down the list on the left in order to see Safari.
4. Block Pop-ups should now be visible on the Right hand side and will be ON. You will need either to tap on ON, or slide the slider left to turn off the Pop-up blocker.
5. If Block Pop-ups is now set to OFF you can hit the Home button again.
6. Then back to Safari to return to iGO.



WHAT AM I REQUIRED TO LEAVE BEHIND WITH THE CLIENT?

In order to be compliant with applicable state laws, rules and/or regulations, certain terms, conditions and disclosures, client forms and notices are required to be left with the client upon completion of a life insurance application. Please be sure to provide the applicant with the required state forms. You can download the leave-behind forms via the Agent Portal. Below are the steps to access the leave behind forms.

THE AGENT PORTAL

- > Click Forms tab.
- > A search window will appear. Select the appropriate choices from the drop down menus and click Search.
- > Download the iGO forms to your Desktop and print.
- > The iGO Forms can also be e-mailed to the customer at the end of the application if the agent enters the e-mail address on the applicant screen.

