iGO FAQs

What is iGO e-App?

iGO e-App, an intelligent fillable form, enables career and independent producers to improve efficiency and productivity by eliminating errors and producing 100% In Good Order submissions.

How do I access iGO e-App?

You must register for an iGO e-App account through KAFL's website. Can link to website registration.

What are the features of iGO e-App?

- 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 to match your selling styles
- Customizable e-Signature (Email & Digital Pad) for insured, owner, trusts, third parties, & multiple agents
- Standard BGA case manager Go/No-Go approvals
- Electronic submission

How do I unlock a case?

Unlocking the application cancels any e-Signature process, removing all previously collected e-Signatures from the application/ticket forms.

To unlock a case:

1. Log into your iGO e-App account via the general agency, insurance carrier, or financial institutions website with which you registered.
2. Click the **My Cases** button to be directed to your **My Cases** dashboard.
3. Select the desired case by clicking on the client's name. This will direct you to the **Case Information** tab.

4. Click the **Application** tab, and locate the series of lock boxes down the left hand side of your page.
5. Scroll down the left hand side of your page and locate the **Validate and Lock Data** screen. **Note:** This screen name may vary by insurance carrier.
6. Click the **Validate and Lock Data** screen to find the **Unlock** button.
7. Click the **Unlock** button.

Note: Once an application has been unlocked, you may be required to click through each electronic screen once more to re-validate and regain your green check marks.

How to Resend e-Signature emails

1. Log into your iGO e-App account and navigate to the **My Cases** screen.
2. Locate the case for the desired client.
3. Click the **Case Details…** button that corresponds to the desired case.
4. The e-Signature resend tool is on the right hand side of the **Case Details…** page.
5. Click **Resend**. Any client eligible to receive an email displays a **Resend** button. A pop up window displays with the client name and email address.
6. Edit the email address at this time, if applicable.
7. Click **Resend Email**.
8. An email containing a new e-Signature link is sent to the selected recipient.

Note: All previously sent emails and links are deactivated. Please be sure to check all junk and spam folders frequently throughout the e-Signature process.

e-Signature Log In Credentials: Did you enter the wrong PIN/SSN/TIN number too many times?

Consumers, Agents, and Case Managers are required to authenticate into the e-Signature process using a unique PIN, TIN, SSN. 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. To resolve this issue, follow these instructions.

What is my PIN, SSN, TIN?

The 4 digit e-Signature authentication number is pulled directly from information entered within the iGO e-App electronic screens. For example, the insured e-Signature credentials will typically be pulled from the social security field located on the Proposed Insured screen. For this reason, you may want to go back to that screen, and verify that the Insured's SSN was entered accurately.

1. The client's authentication number may vary depending on their e-Signing role. For instance, and individual e-Signing on behalf of a corporation may be required to authenticate using the last digits of

the Tax Identification Number. Typically, the consumer will use an SSN or TIN to access the e-Signature process.

2. The agent will typically use the last four of their SSN to authenticate into the e-Signature process. It is possible that the agent was provided the opportunity to make up their own unique four digit PIN, in which case it would be whatever they entered on the electronic e-Signature screens within iGO.

How to check who has been sent an email on a case, to see if any party has been missed.

Log into iGO e-App and navigate to the email sent screen. This will display a chart of all the signers that have been sent emails, and the date it has been sent.

What to do if agent or client is not getting the signature email, and it has already been verified that the signature email has actually been sent to the party not receiving the email.

1. If the agent or client is not receiving the email, make sure they check their email junk/spam folder.
2. If you are still unable to locate the signature email, please call support at 800-641-6557.

How to view and print an application directly from the iGO e-App.

1. Log into iGO e-App, and click into the case.
2. At any screen you can click the “View Form” link, at the right hand side of the screen, to view the PDF.

How to check the status of a case (i.e. pending, pending agent sig, waiting for submission approver to sign, pending agency approval, completed, and expired) from the clickwrap admin screen. Also, information about the clickwrap admin screen, how to navigate around, and an explanation of the various statuses.

1. Log into iGO e-App.
2. Click ‘View My Cases’
3. Next to the name of each case, the status should appear.
4. By clicking on the status button at the top of the page, you can sort the cases by their status
5. To learn more about what each status means, click on the small information button (blue, with a white ‘i’)

6. Clicking on the ‘Case Details…’ button will give you more information about the status of each signer under the ‘e-Signer Status’ section.

What if a signing party declines to e-Sign? Next steps.

Each e-Signing party is offered the opportunity to decline to e-Sign, therefore opting out of the e-Signature process. If a signing party declines, the current e-Signature process will be cancelled. Pending the reasons for why the e-Signer chose to decline, you may choose to re-initiate the e-Signature process. To do so, follow the steps below.

1. Log into your iGO e-App account and navigate to the My Cases screen.
2. Click the name of the client you wish to re-initiate the e-Signature process for.
3. Navigate to the Application Tab located near the top of your page.
4. Locate the lock boxes down the left hand side of the page, and scroll down to locate the ‘validate and lock data screen’ or ‘lock unlock data screen’ *(this screen will have a green check mark next to it.)*
5. On that screen, click the ‘Unlock’ button.
6. Once the application has been unlocked, you may navigate through the electronic screens and make changes to the application, if needed *(you may have to click through each of the electronic screens to revalidate and regain your green check marks).*
7. Once you have completed making any changes and have revalidated all application and forms screens, you may lock the application and proceed through the remaining screens to resend all consumer emails.

What to do when a case is in Status of Expired

1. Agent needs to unlock the app, they can’t resend the email from the clickwrap admin, they will get an error “record is ineligible for resending”

Are your emails being blocked by your email provider?

Click here to see steps for adding email address to your safe senders list.

https://training.ipipeline.com/igo/safe-senders-list/