Using iPipeline's iGO e-Application with Foresters Financial – Tips & Support

Foresters Financial

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Tips for using iPipeline's iGO e-App

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    - e-App is available in all states, except NY through the iPipeline iGO e-App platform using Microsoft Edge (desktop/laptop) or Safari (Apple iPad® only). Foresters Financial™ does not support using Chrome or Firefox

    - For document e-Delivery and the e-Signature process, each person signing must have their own email address or cell phone number and cannot share or use one that another person has, or you the Agent, have access to. Examples of, but not limited to: between spouse; between juveniles age 16 or 17 who are required to sign the application and their parent

    - Except for your own signature, you, the Agent, cannot use your own email address or create an email address for another signer or allow any person signing to use your email address or an email address that you have created or have access to, nor can you offer your cell phone number or a different cell phone number for them to use

    - The email address used for the Proposed Insured and/or Owner cannot contain the name of another person signing or the name of the primary or contingent beneficiary, unless the Owner is listed as a beneficiary

    - Each person signing must be able to receive emails at their own email address or text messages at their own cell phone number and open links in an email to access documents, such as PDFs

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  – If an email account is to be set up specifically for e-App, it must be the signer who sets up that email account and keeps their account password private. You cannot set up an email account for them

  – You may get an error message if you have more than one browser window open. If this happens, close each browser window and re-launch the e-App

  – For all devices – laptop, desktop, Apple iPad, $^®$ Apple iPhone $^®$ and Android cell phones

    1. Turn on *Pop-ups* to see the PDF of the application and forms

       – Laptop/desktop - open Microsoft Edge, click the *3 dots* (top right of the screen), click *Settings*, then click *Cookies and site permissions.* Under "**All Permissions**" allow "**Pop-ups and redirects**"

       – Apple iPad/iPhone– go to "**Settings**", click *Apps*, then click *Safari* and turn off "**Block Pop-ups**"

       – Android cell phone – open Chrome, go to "**Settings**", click *Site settings* and allow "**Pop-ups and redirects**"

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   2. Turn off *Autofill* to avoid selecting incorrect data

      – Laptop/desktop - open Microsoft Edge, click the *3 dots* (top right of the screen), click *Settings*, then click *Profiles*. Click *Settings*, under "**Microsoft Wallet"** click *Passwords,* then click *Settings.* Under "**Payment Method"** turn off "**Save and fill payment info**" and under "**Personal info**" turn off "**Save and fill basic info**"

      – Apple iPad/iPhone– go to "**Settings**", click *Apps,* then click *Safari*. Click *Autofill* and turn off "**Use Contact Info**"

      – Android cell phone – open Chrome, go to "**Settings,**" click *Privacy and security.* Click *Delete browsing data* and turn off **"Autofill"**

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  3. To prevent an incorrect date from mapping to the PDF of the application or from using characters not recognized by our New Business system, make sure to set the "**Windows Display Language to English (United States)"**

     – Laptop/desktop – open Windows Start, click *Settings*, then click *Time & Languages.* Click *Language* then click *English (United States).* Next, click *Region*, then click *Country & Region* and select *United States* as the Country and *Recommended English (United States)* as the Regional Format

     – Apple iPad/iPhone - go to "**Settings**," click *General*, then click *Language & Region*. Select *English* for iPad Language

     – Android cell phone - go to "**Settings**," click *General management* and select *English* for Language

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  - 4. Clear browser cache to prevent unwanted data from being carried forward into the e-App
    - Laptop/desktop – open Microsoft Edge, click the *3 dots* (top right of the screen), click *Settings*, then click *Privacy, search, and services*. Under **"Clear browsing data for Internet Explorer"**, click the *delete browsing history*" link
    - Apple iPad/iPhone - go to "**Settings**", click *Apps*, then click *Safari*. Click *Clear History and Website Data*
    - Android cell phone – open Chrome, go to "**Settings,**" click *Privacy and security,* then click *Delete browsing data.* Select *Browsing history, Cookies and site data and Cached images and files,* then click the *Delete data* button

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  - You can complete the e-App in any order. You can click *Next* or *Back* or you can click the screen name in the left-hand Navigation Tree. Regardless of the order you choose, all screens need a green check mark before you can electronically submit the e-App
  - Most screens do not prevent you from entering a response that makes a previous response inaccurate; just like a paper application. For example: year of birth entered is 1965 but, on another screen, you enter a year that is earlier or later than 1965; this date will be accepted so it's important to make sure the information entered is accurate. The only time you'll be alerted is if a date you've entered is in the future
  - At any time throughout the e-App process you can click *View Forms* to see what data has been captured on the documents. You can print the documents. However, if you decide to stop the e-App process and print the documents prior to electronically submitting the e-App, only the information entered up to that point will be captured. You will need to complete the remainder of the application in pen, collect a wet signature from all signers, leave all applicable Point of Sale forms with each signer and send the signed, paper application package to Foresters, as you normally would

Support

Support

- If you have any technical issues, click *Need Assistance?* at the top of the e-App screen, then click *Chat Live - Online*

  You can access a *Chat Live – Online* session with an iPipeline representative. *Chat Live – Online* is available from 8:00am–8:00pm ET Monday to Friday

  If you try to chat during off hours, an email will be sent to the iPipeline Support Desk to be picked up the following day

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Thank you

Any questions?

- Our Foresters Financial Sales Support team is only a call away, 866-466-7166, option 1

- If you're looking for a deeper dive on a particular module please let us know at USLearning@foresters.com