iGO® e-App, Illustrations, and PolicyHS®

March 1, 2014

Base Release Notes

iPipeline's 8.3 Release

iPipeline's 8.3 release focuses on system architecture, quality, and improved solution performance.

Browser and Device Support

We continue to support the new versions of the most popular web browsers, including:

- Microsoft® Internet Explorer (8, 9, 10*, 11)
- Firefox (for Windows)
- Apple® Safari® (for Mac and iPad)
- Google® Chrome® (for Windows)

With regards to Firefox and Chrome Browsers, iPipeline's goal is to support the most current version of a browser, as well as its previously released version on a rolling basis. Each time a new version is released, we will work towards supporting it.

We continue to support the iPad®. Testing for this release was performed on iPads with iOS 7 running Safari.

We support tablets operating on a Windows® 8 Pro operating system.

*We support the use of IE10 with the exception of one known cosmetic issue. This issue will not prevent a user from completing, locking, and submitting a case, and will be resolved in a future release. Please contact iPipeline Support for more information.

* Windows 8.1 Pro - iPipeline continues to test Disconnected installs on Windows 8.1 Professional operating system. Currently, an outstanding compatibility issue exists between the update functionality on the Disconnected platform and the Windows 8.1 file system. We are continuing to work toward a resolution.

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Performance and Architecture

Submissions & Transmissions

Feature Name: Submissions & Transmissions

Description: Updates have been made to the submissions and transmissions managers that handle the processing of iGO e-Apps, Illustrations, and PolicyHS forms.

Benefits: **Enhancements have been made to the Submission and Transmission Managers:** Most notably to the speed with which submissions and transmissions are processed, submission and transmission manager failure and recovery handling, and enhanced redundancy for high availability and scalability.

Speed and Scalability: Numerous services may now run simultaneously to handle concurrent submissions and transmissions. These services can scale on an individual server and across multiple servers. Additionally, each service has been redesigned for speed so that each individual submission processes significantly faster. Improvements in speed, coupled with concurrent processing will result in smaller app queues and faster receipt of submissions and transmissions.

Redundancy and Availability: Multiple submission and transmission services are running across multiple servers. In the event of a submission or transmission manager failure, remaining services will pick up the balance of the load. This equates to decreased submissions and transmissions downtime and uninterrupted receipt of submitted transactions.

Availability: These system enhancements are out of the box and available in iGO, Illustrations and PolicyHS connected and disconnected systems (connected synch required).

Cost: There is no cost associated with these enhancements.

PDF Generation

<u>Feature Name</u>: Enhanced PDF Generation

<u>Description</u>: Performance improvements have been applied to decrease the time with which forms packages are rendered.

<u>Benefits</u>: Multiple changes to the system contribute to increased performance of forms package rendering. Changes include the caching of PDF templates for prompt retrieval and eliminating the use of intermediate zip compression files

Additionally, the system now utilizes multi-threading capabilities that allow multiple forms in a forms package to be built simultaneously as opposed to building the forms sequentially.

<u>Availability</u>: This feature is available in iGO, Illustrations *(when an already completed illustration is a part of an application forms package)* and PolicyHS.

<u>Cost</u>: There is no cost associated with these enhancements.

Independence of Needs Analysis and Advanced Sales Solutions

<u>Feature Name</u>: Independence of Needs Analysis and Advanced Sales Solutions

<u>Description</u>: The Needs Analysis and Advanced Sales solutions have been separated out from the base code, relieving the solutions of their base code release dependency.

<u>Benefits</u>: Autonomy of these solutions provides the opportunity to implement enhancements and defect resolutions outside of a major base code release. Historically, any updates to the Needs Analysis and Advanced Sales solutions requiring changes to the base code were tied to the typically semiannual base releases. Taking into account the type of change, associated risk, and effort involved to implement a particular change, enhancements and defect fixes may potentially be implemented off cycle and outside of a base release.

<u>Availability</u>: Specific to the Needs Analysis and Advanced Sales solutions.

<u>Cost</u>: The change in architecture to the Needs Analysis and Advanced Sales modules are out of the box and apply to all Needs Analysis and Advanced Sales customers.

New and Enhanced Features

iGO® Admin Tool

Feature Name: iGO® Admin Tool

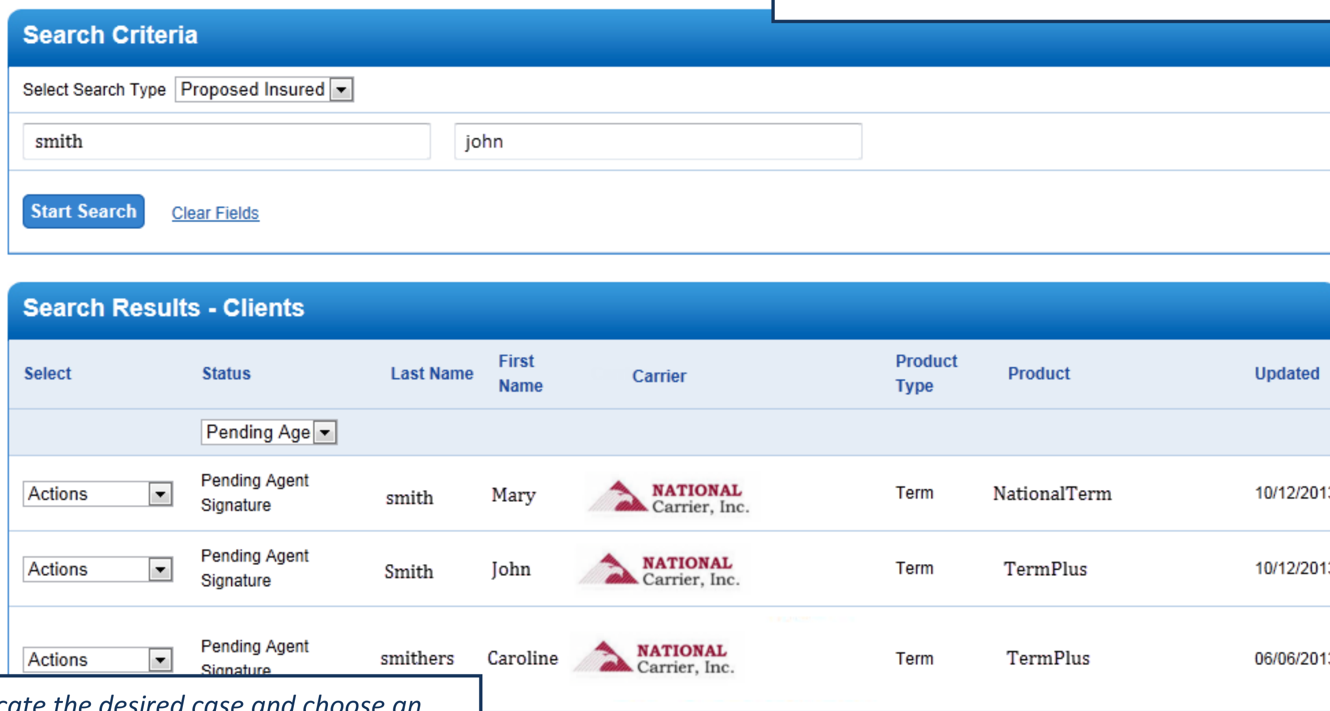
Description: The iGO Admin Tool is a secure tool with which an administrator may search for and view started, pending, and submitted case data within their carrier channel.

Benefits: The iGO Admin Tool allows authorized users to search for cases by agent or proposed insured name. Subsequent to locating a case, users may view details and perform functions that include but are not limited to:

- Viewing *case status (i.e. started, awaiting consumer e-Signature, etc)*
- *Resend e-Signature Emails*
- *Viewing e-Signature method selected for an individual case*
- *Unlock e-Signature links*
- *Viewing dates and times of individual case events*

(See example of available functionality below)

Access the Select Search Type drop down to search by agent or proposed insured name. Key the name of the desired individual and click Start Search.



Locate the desired case and choose an available option from the Actions Drop down menu. You may further refine your search by selecting a Status from the Status Drop Down menu.

Availability: To request training and access to the Admin tool, please submit a request to support@ipipeline.com and a trained support representative will assist you.

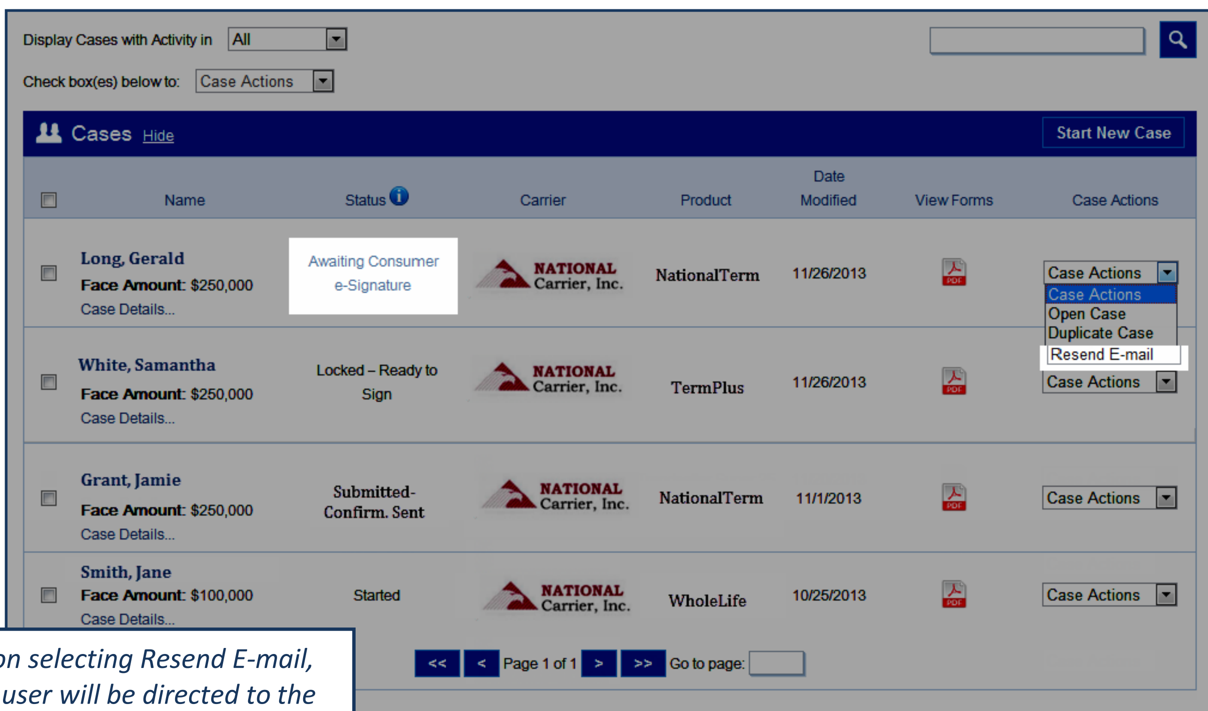
Cost: This tool is out of the box at no additional cost. Environment setup, access, and training are required by iPipeline Support.

Resend Email Case Action

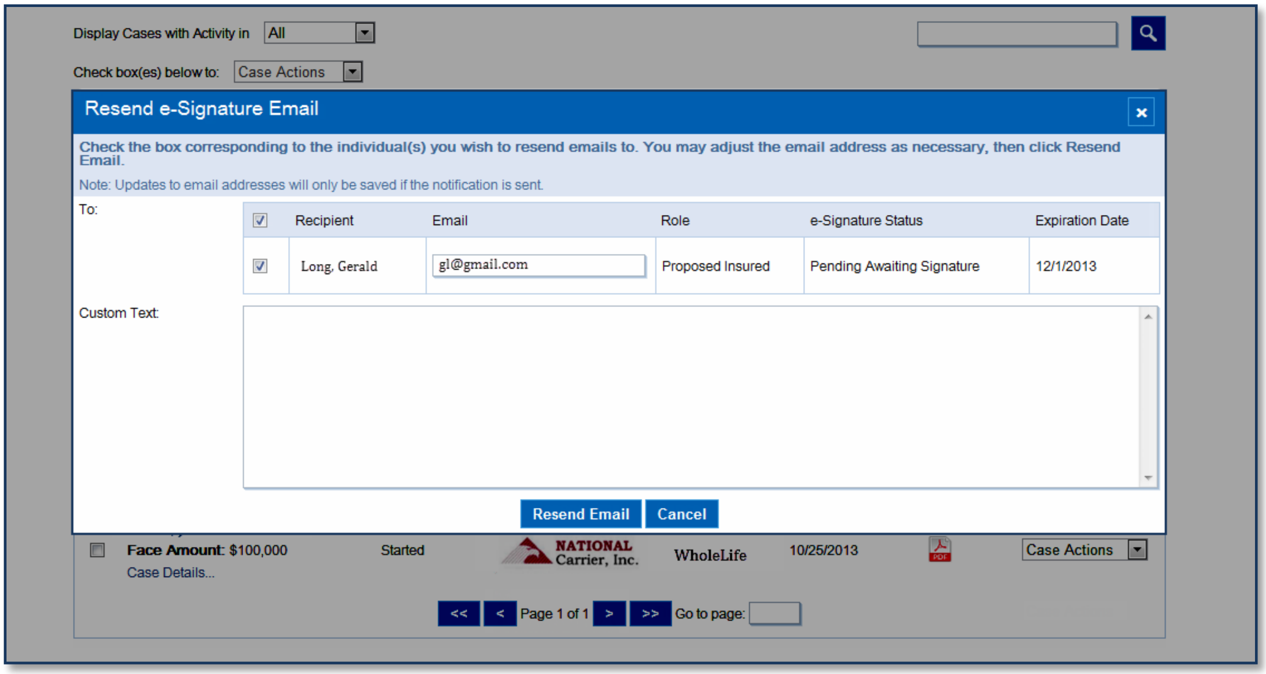
<u>Feature Name</u>: Resend Email Case Action

<u>Description</u>: A new case action has been added to the Case Actions drop down menu. Users may resend e-Signature emails directly from the My Cases Dashboard.

<u>Benefits</u>: Previously, agents and users navigated to the Case Details page of the My Cases Dashboard to view e-Signature details and to resend e-Signature emails. Users may now access the Resend Email function directly from the list of available actions in their Case Actions drop down menu (when applicable). Access to the resend feature directly from the My Cases dashboard allows for quick, convenient access to this frequently utilized feature.



Upon selecting Resend E-mail, the user will be directed to the standard resend email pop up window (shown below).



Availability: This feature comes out of the box and is available for iGO e-App customers utilizing e-Signature via email.

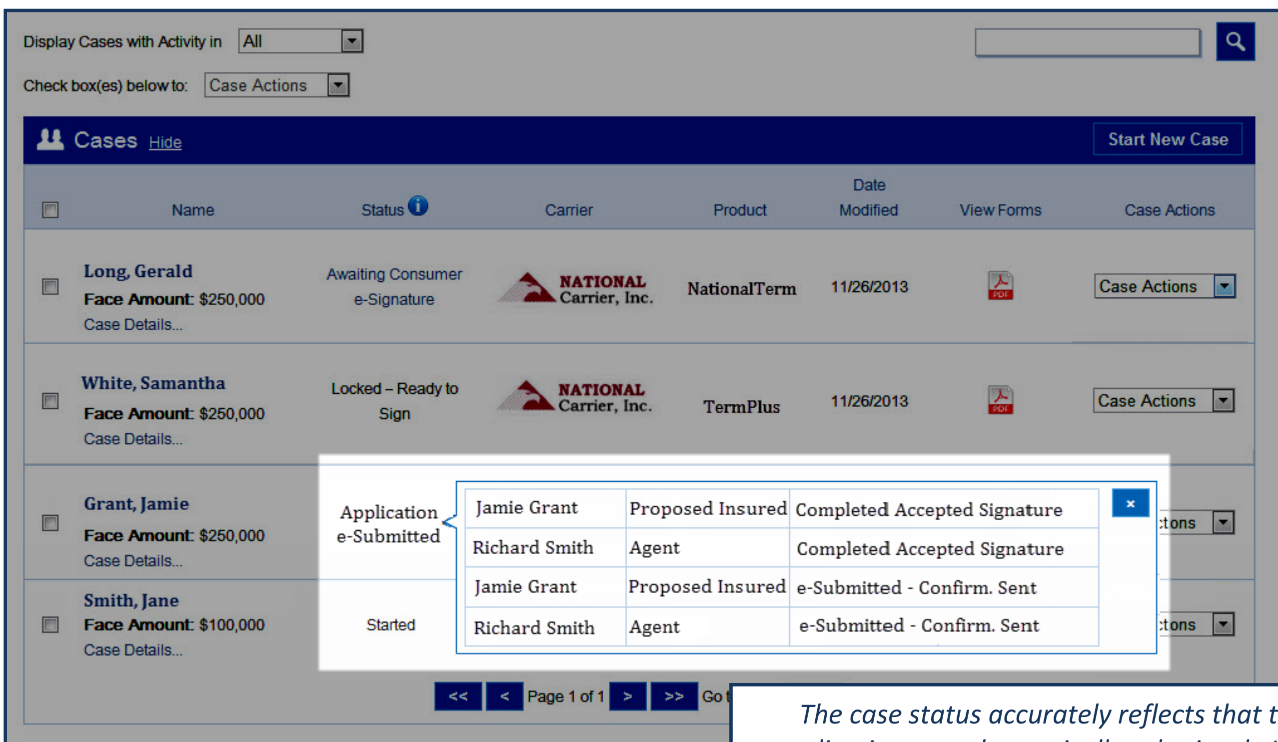
Cost: There is no cost associated with this feature.

Post Submission Email Status

Feature Name: Post Submission Email Status

Description: The status *"e-Submitted-Confirm. Sent"* has been created to address instances where post submission emails are sent to parties who participated in the electronic signature and submission process. Additionally, modifications made to the system allow the status *"Application e-Submitted"* to display after post submission emails are triggered.

Benefits: Post submission emails are sent subsequent to the submission of a case. The emails contain a secure link that each recipient may access to obtain completed and e-Signed copies of all forms. Adding the "e-*Submitted-Confirm. Sent*" status eliminates confusion surrounding case statuses when post submission emails are delivered.



The case status accurately reflects that the application was electronically submitted. Users may hover over the case status to view individual e-Signature statuses confirming post submission emails were sent to the appropriate parties.

Additionally, users may view e-Signature status details via the Case Details page.

<u>Availability</u>: Available for iGO e-App projects where the post submission email functionality is implemented.

<u>Cost</u>: This feature is out of the box at no additional cost. Both the status enhancement and post submission email feature offer flexibility with regards to how they may be implemented. Please contact your project teams for additional information regarding post submission email status.

Please note: there is an implementation cost associated with the post submission email feature.

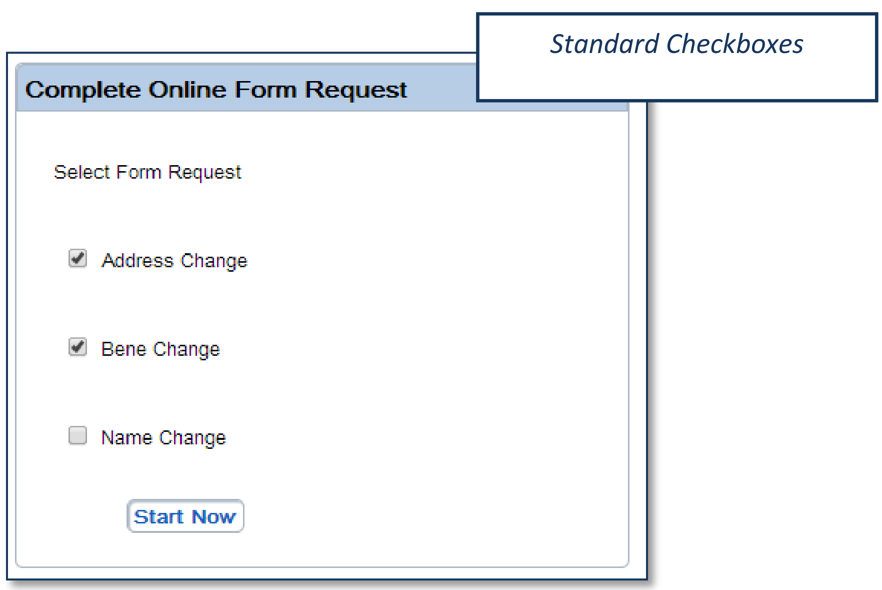
PolicyHS® Widget Configurability

<u>Feature Name</u>: Policy Holder Services Widget Configurability

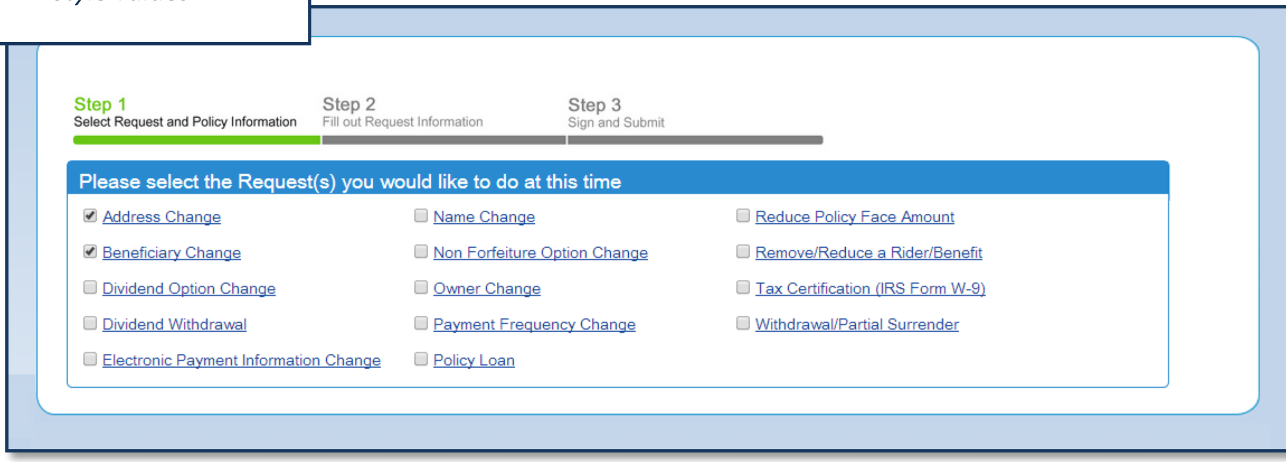
<u>Description</u>: The policy holder service widget tool is placed on carrier website portals so users may access policy holder service electronic forms.

<u>Benefits</u>: For many PolicyHS customers, their policy holder service forms are available to consumers and are located on a consumer facing portion of their website. Enhancements were made to the widget to allow for additional configuration and customization so carriers may apply styles to better match the look and feel of their website portals. The ability to control the style of the tool equates to a more seamless experience for the end user. Available styling options include:

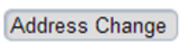
- *Passing of custom style sheets*
- *Checkboxes*
- *Drop down menus*
- *Individual form buttons*
- *Hyperlinks*
- *Custom text and button design*



Checkboxes with custom style values



Simple text button



Request for Change

Simple hyperlink

Button with custom style values

Availability: Customizations and configurations are available to PolicyHS subscribers.

Cost: An additional cost may apply to implement new widget styles. Please reach out to your project teams for more information.

Support for New Attachment Types

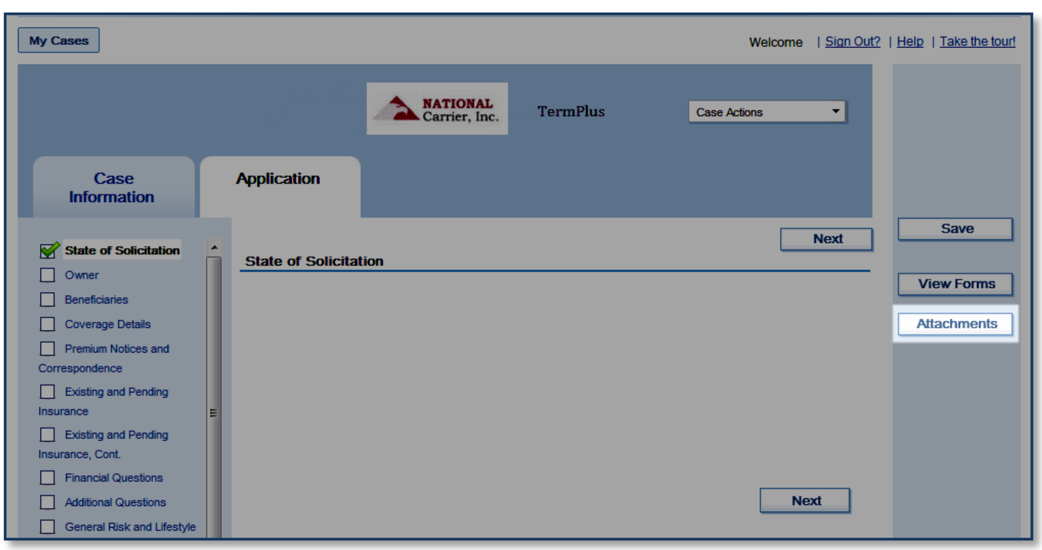
Feature Name: Support for New Attachment Types

Description: The Document Upload Attachments feature within Illustrations and iGO e-App now allows for the upload and attachment of additional file types.

Benefits: Users may upload file attachments with their Illustration and iGO e-App submissions. Subsequent to uploading an attachment, users may view forms packages inclusive of their individual uploaded attachments.

Supported Attachment Types:
.PDF
.TIFF (LSW compression format not supported)
.TIF (LSW compression format not supported)
.JPEG
.JPG (Temporarily unavailable in Internet Explorer Browsers)

Please note: *there are many different types of tiff file compression formats in use today, some of which cause negative system results. The tiff file compression format is often determined by the software that was used to create the tiff file, i.e. Microsoft Paint. iPipeline will scan each tiff file, blocking those files that were created in an unacceptable format. If a tiff file upload is blocked, the user will be presented with the following message: "File cannot be uploaded; its compression format is not supported." For additional information, please contact your project team directly.*



<u>Availability</u>:	Available for Illustrations and iGO e-App customers utilizing the Upload Attachments feature. This is available in connected and disconnected solutions (user must be connected to electronically submit).
<u>Cost</u>:	Support for new attachment types is out of the box at no additional cost. Please contact your project team for additional information. Please note: there is a cost associated with implementing the Document Upload Attachment feature.