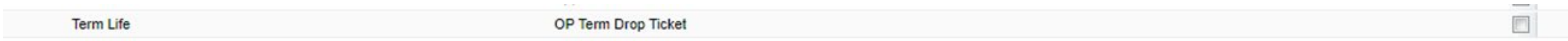
iPipeline Updates:

Introducing the Horizon Experience

iPipeline Updates: the Horizon Experience

Welcome to the Horizon Experience on iPipeline! We've put together a helpful list of what these changes mean for your business process as you review these slides:

- The GA will no longer be required to release a ticket to us once an advisor "drops a ticket." Notice will be provided to the GA as a blind copy of the email that is sent from the advisor to the client.
- Once notice is received, the GA can now access the information from the dashboard once the case moves to "Link Sent" status. Please note the ticket information will no longer be available once the ticket moves to "Application Started" status.
- The advisor will now complete a few extra steps on our site to complete the process versus stopping after a ticket has been "locked."
- **Note: you may need to change your profile settings in iPipeline to reauthorize Banner.** See screenshot below.



Contact us directly with any additional questions. Thank you and welcome to Horizon.

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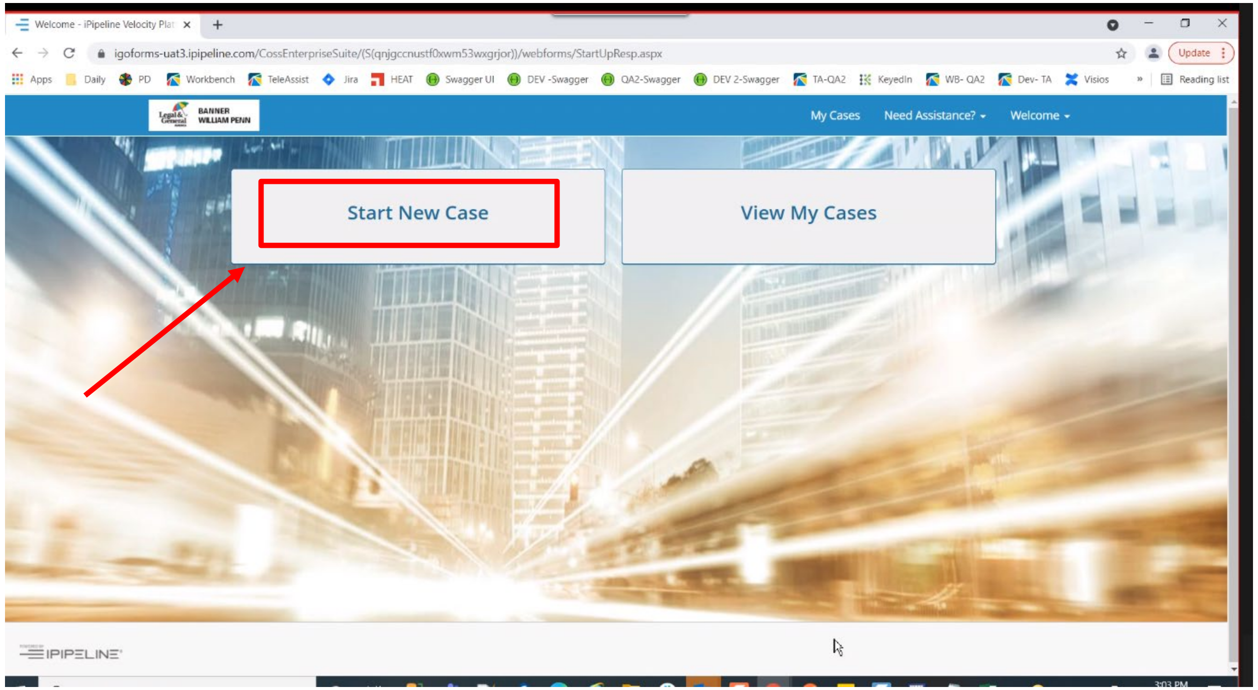

1. On the main page, select “Start New Case.”

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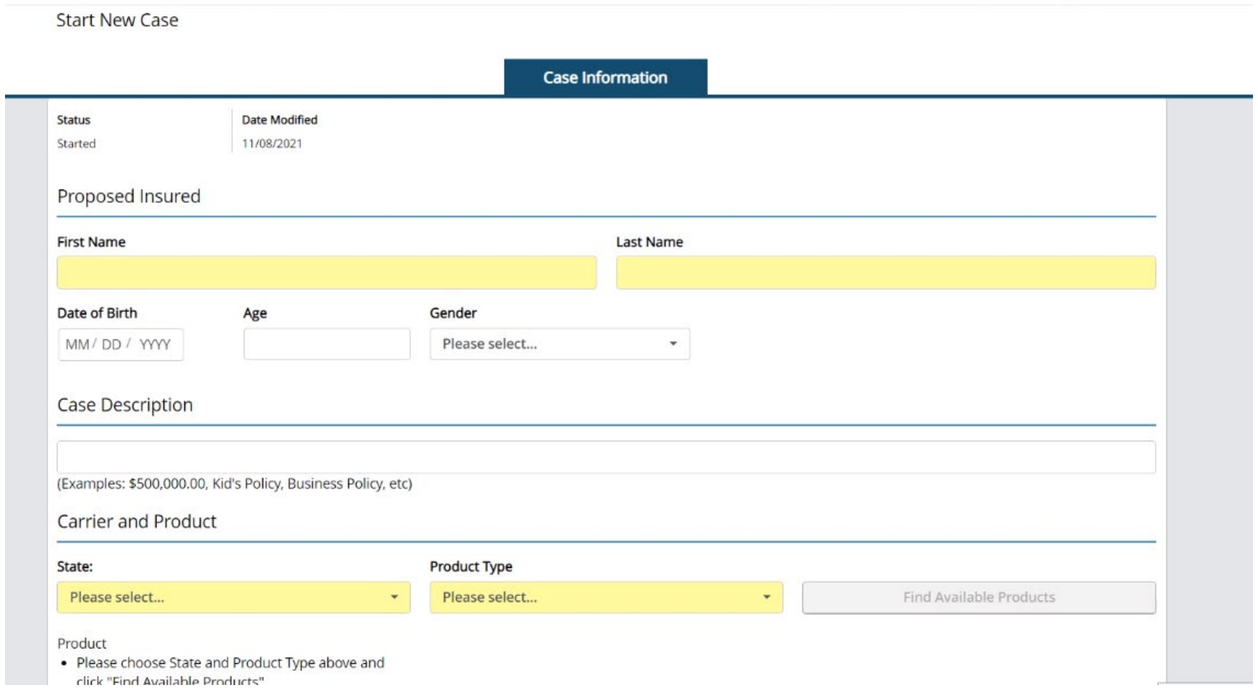

2. After clicking “Start New Case,” you will land on the case information screen. Note that you must complete the yellow highlighted fields. All populated fields will carry over and prepopulate the digital application.

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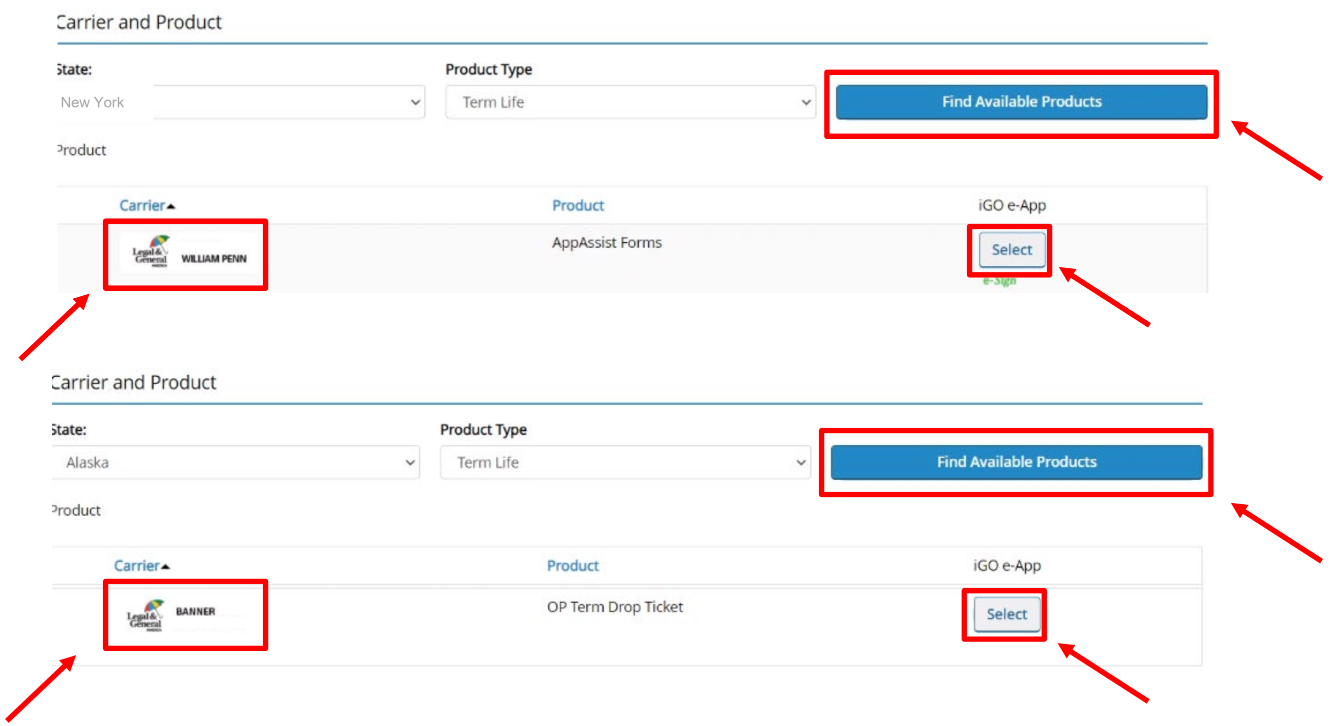

3. Once you have populated the “Product Type” field, the “Find Available Products” button will turn from gray to blue. Click on the “Find Available Products” button.
4. If the state field is New York, you will see “AppAssist Forms” for William Penn. If the state field is any state but New York, you will see “OPTerm Drop Ticket” for Banner.
5. Hit the “Select” button on either view to proceed to the application screen.

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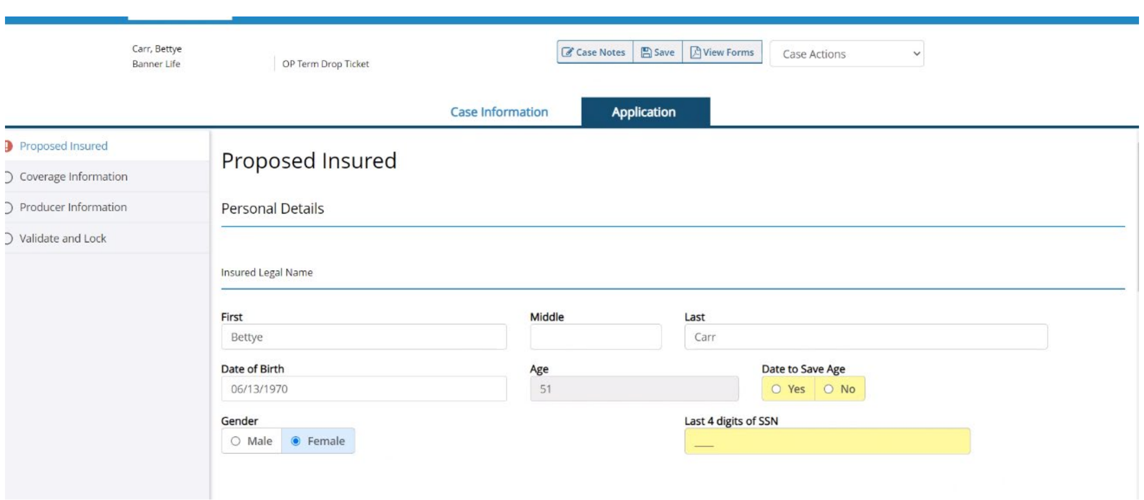

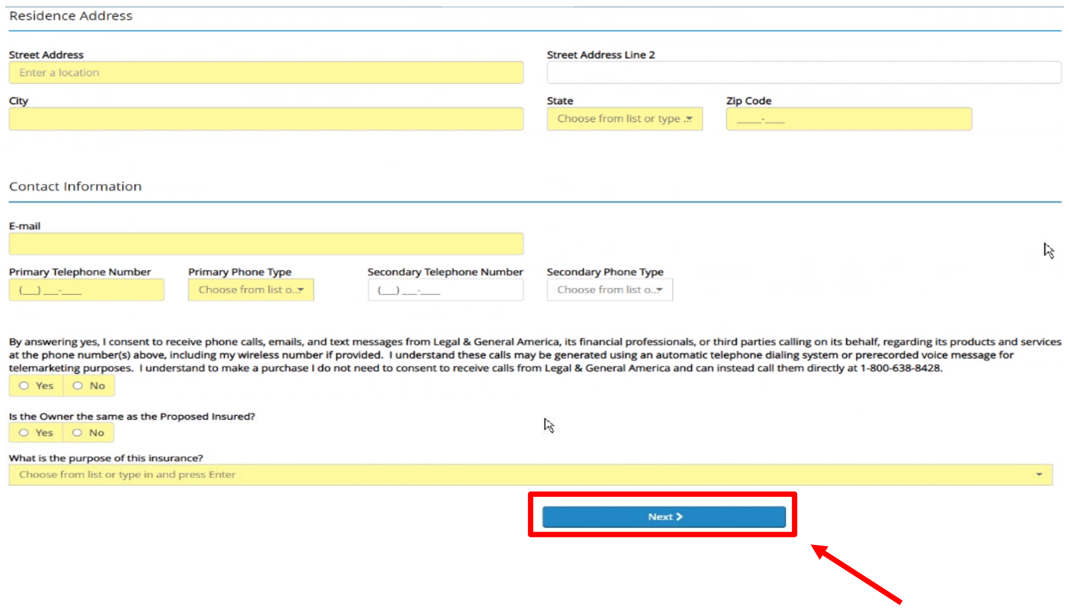

6. Once the prior screen has been completed with carrier and product, all previously filled out information fields from the prior screen will carry over to the application screen and prepopulate the digital application. As noted in a previous slide, you must complete the yellow highlighted fields.
7. After fields are completed, click on the “Next” button at the bottom of the screen on the right to move onto coverage.

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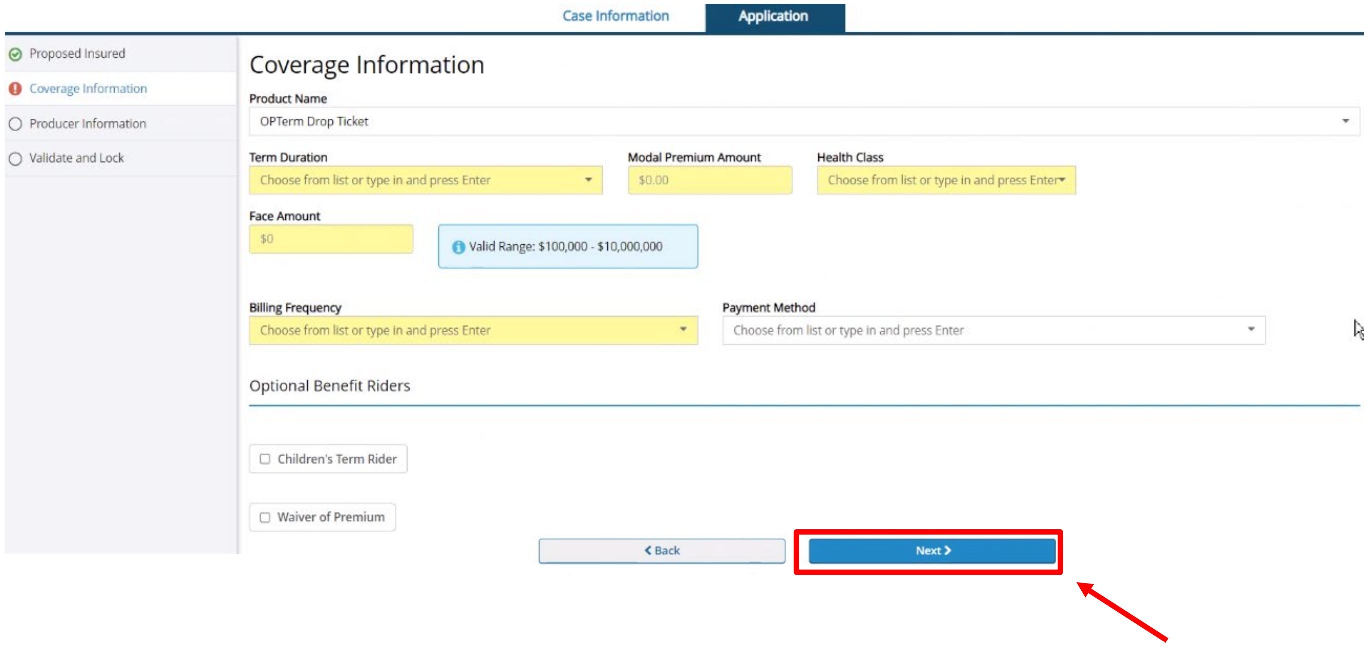

8. On the coverage screen, all previously filled out information fields will carry over. Again, all fields highlighted in yellow must be completed. The “Payment method” field can be updated as needed.
9. Click the “Next” button to proceed to producer information.

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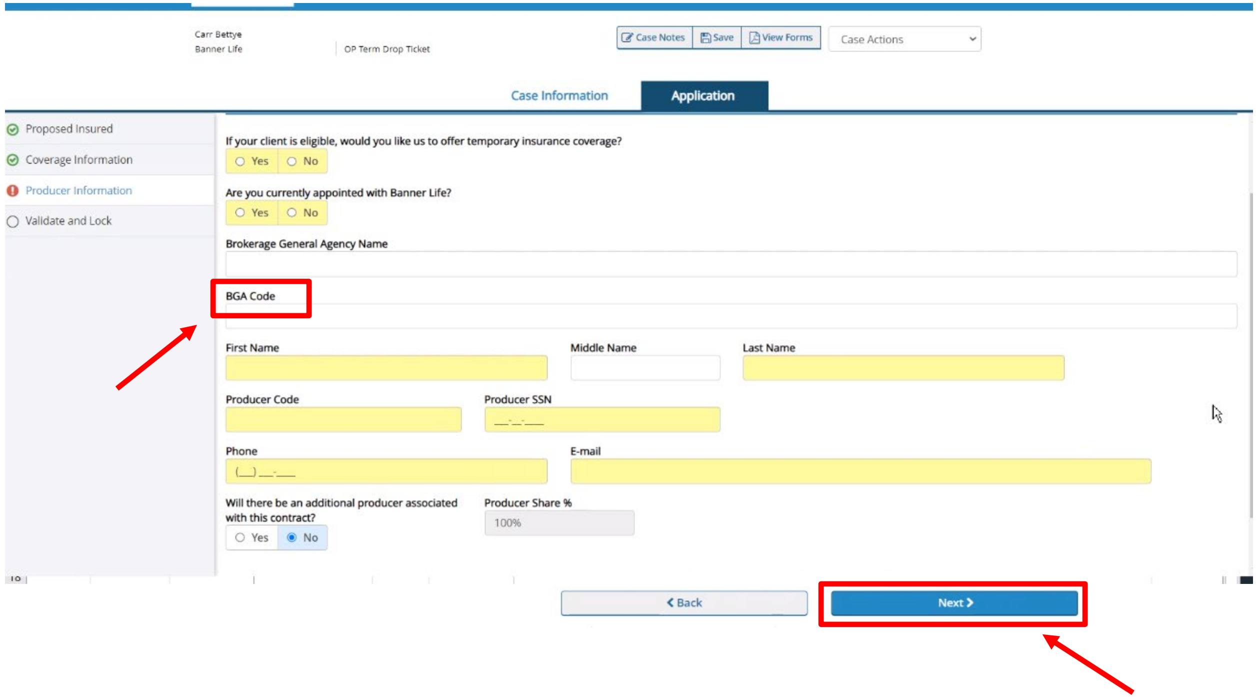

10. On the producer information screen, all previously filled out information fields will carry over. Again, all fields highlighted in yellow must be completed. If not appointed with LGA, you will need to enter the BGA code.
11. Click the “Next” button to proceed to validate and lock.

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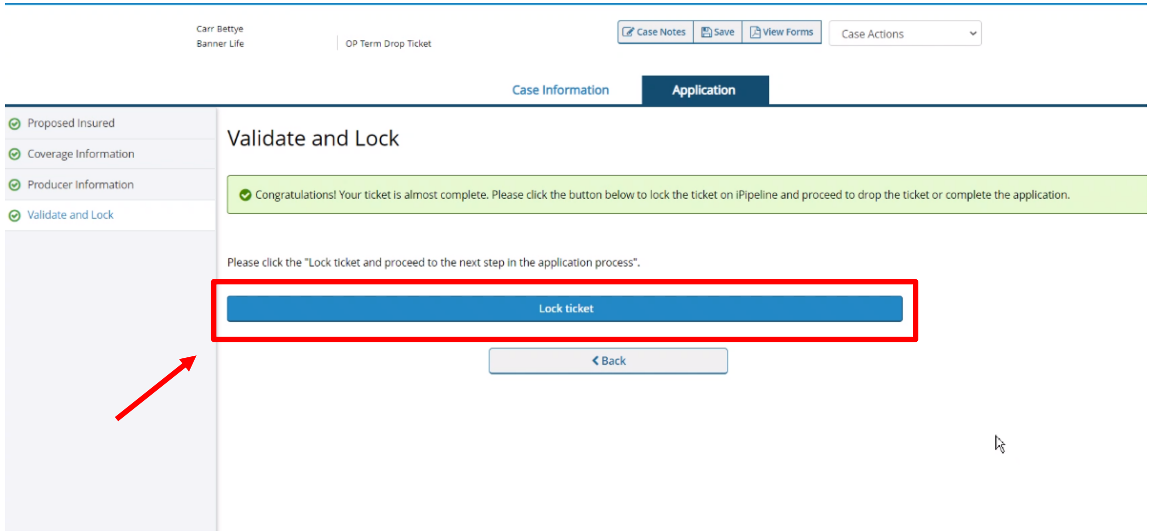

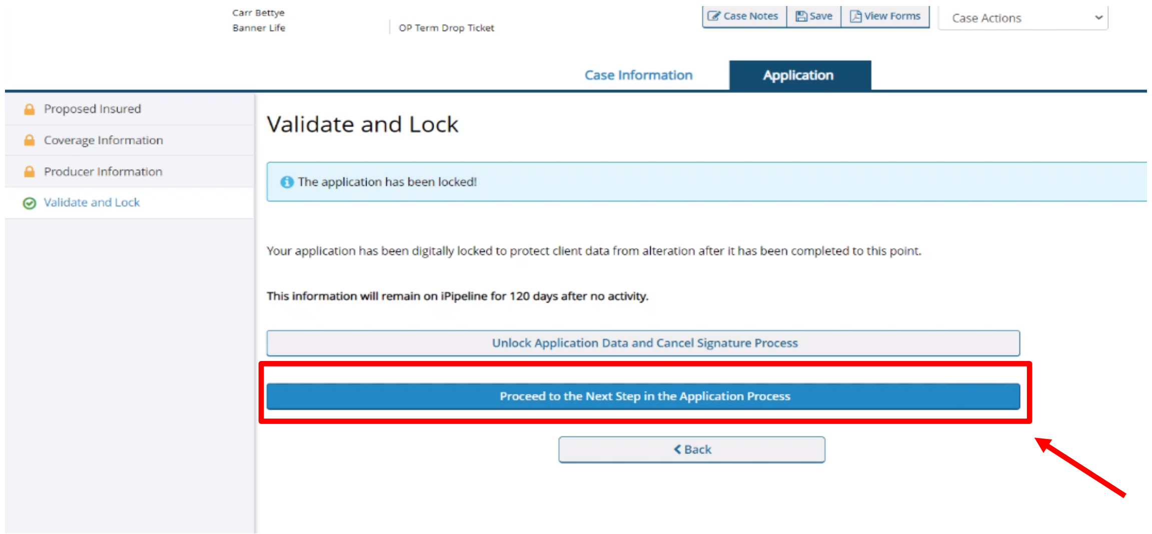

12. On the validate and lock screen, select “Lock Ticket.”
13. Then, select the blue button to “Proceed to the Next Step in the Application Process” to move onto the LGA digital application and attestation page. Note that this step replaces GO NO GO.

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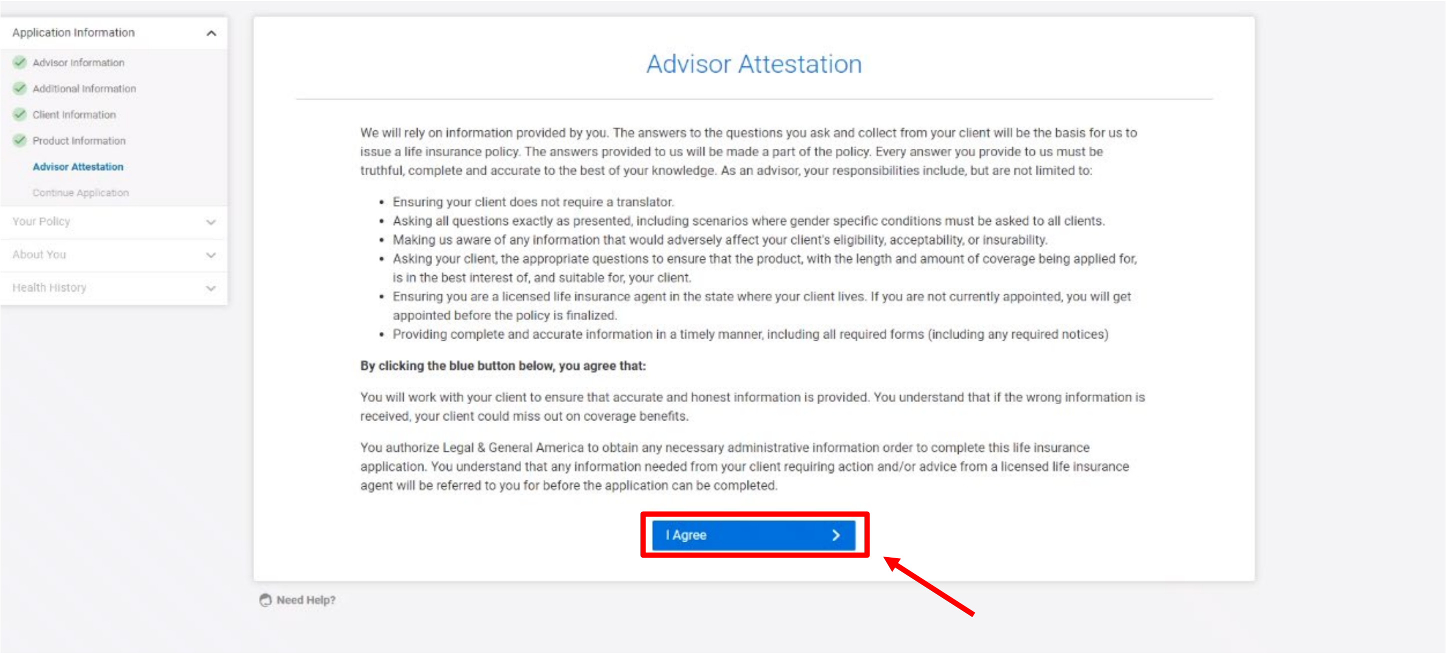

14. On the advisor attestation page, click the “I agree” button to continue. Should you need to go back and change any of your information, you can do so using the left navigation panel.

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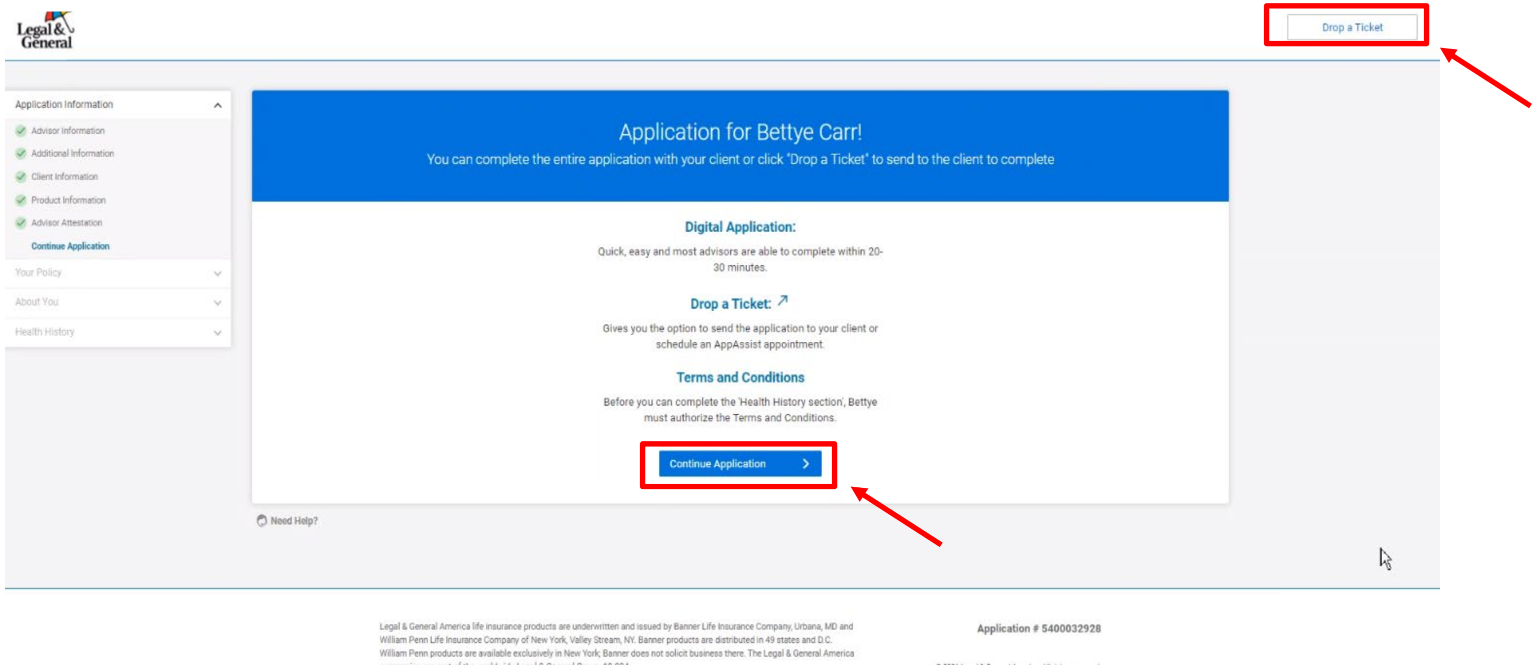

15. You then need to decide to:
    a. drop a ticket/set up a phone interview by clicking the “Drop a Ticket” button in the top right
    b. continue the application with the client by clicking the “Continue Application” button in the middle bottom.

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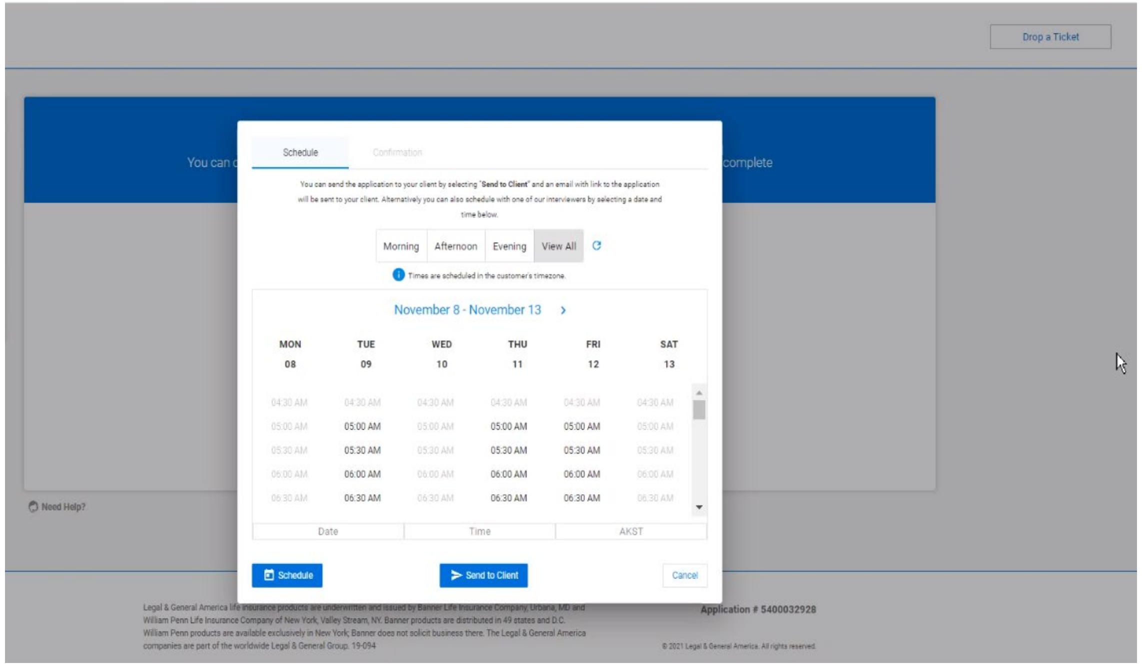

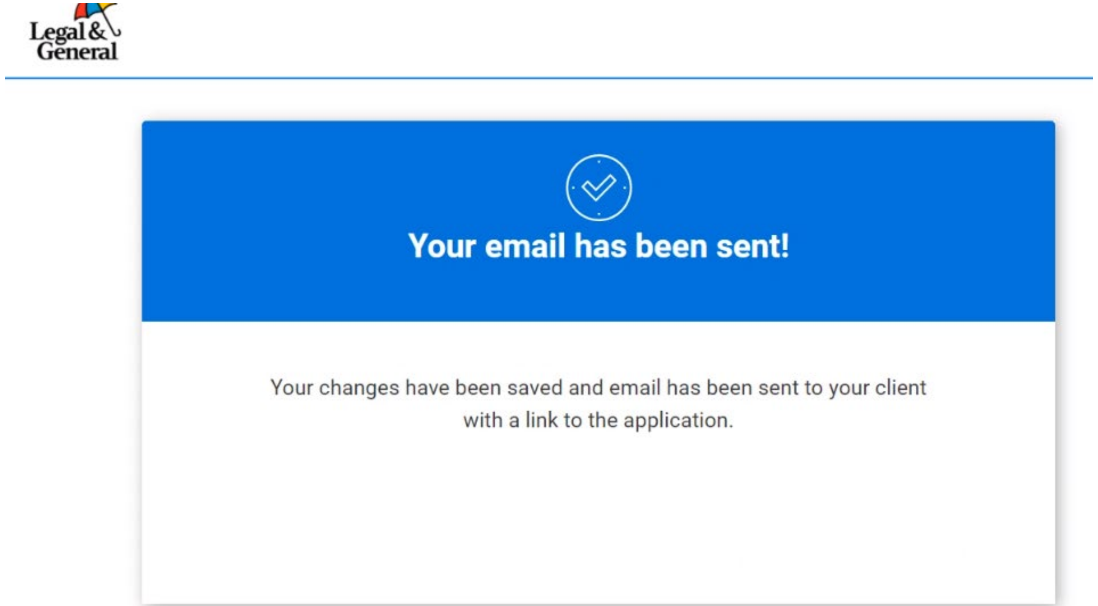

16. If you select to drop a ticket, you will see a scheduler screen as shown above. Click the “Send to Client” button to share an application link with your client. Once completed, you will see a confirmation screen.
17. Close out the browser from the confirmation screen. If you select a date and time on the scheduler screen after opting to “Drop Ticket” (prior screen), you can click the “Schedule” button to schedule the interview.

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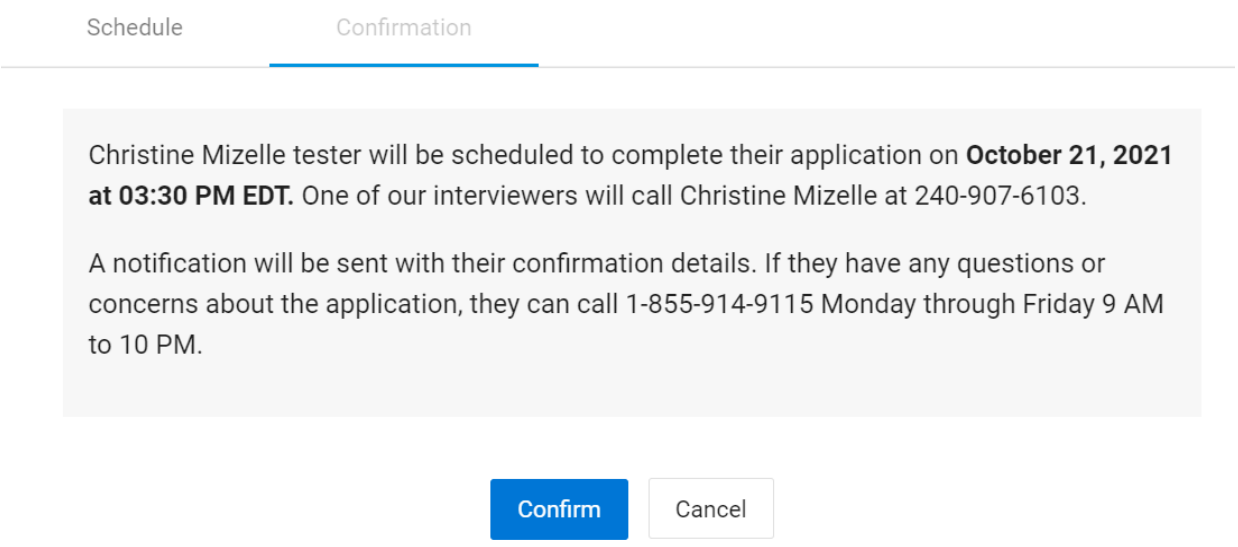

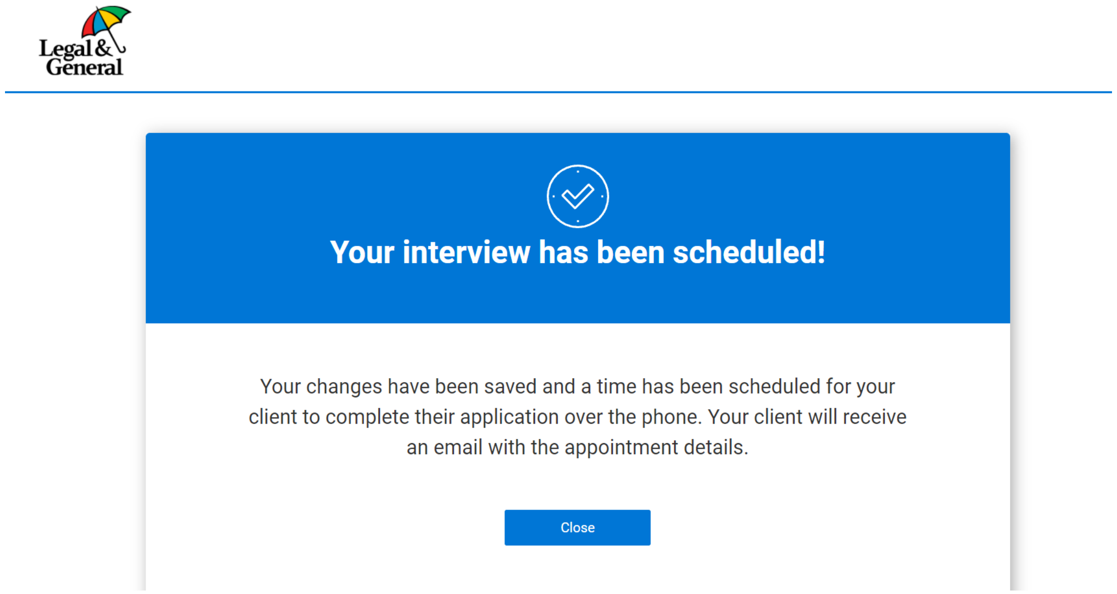

18. Once you have selected the “Schedule” button, you will see a confirmation screen.
19. Click “Confirm” after reviewing the information show. You will see another confirmation screen letting you know that the interview has been scheduled.
20. Click “Close” to close out of the browser for the interview confirmation screen.

Please ensure you follow all the steps to submit your ticket.

For more information contact:

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