

## GO/NO-GO Feature

### What is GO/NO-GO

GO/NO-GO allows distributors to maintain the same level of control over life insurance applications in an electronic world that they have today in a paper world. GO/NO-GO provides the ability to identify gatekeepers to review individual agent applications. These gatekeepers (i.e.-case managers) can view, approve, or decline an application prior to its release to a carrier. Approved cases are routed to the carrier and declined cases are routed back to the agent for updates or modifications.

### What are the GO/NO-GO basics for life insurance?

GO/NO-GO allows the distributor to manage their agents' submission capabilities. The distributor principal can assign a Case Manager to each agent. The Case Manager can then determine: (1) Which agents will not require review and can submit directly to the carrier, and (2) Which agents will require review and a GO or NO-GO to carrier decision.

### How do I assign a case manager?

The individual(s) in the brokerage office responsible for assigning case managers will see a submission approval maintenance link, in your iService tool, within the iGO Configuration section, to the left of the screen. In the submission approval maintenance section, you will see the case manager administration screen. Here, one can assign a case manager to each agent and establish if the agent can auto submit to the carrier (i.e., auto submit - Yes) or if case manager approval is required (i.e., auto submit - No).

### What happens to applications completed by an agent before a case manager is assigned?

Applications submitted by an agent before a case manager is assigned, will require approval. The application will be sent to the person in the office responsible for assigning a case manager (known as the default administrator) for review and approval.

### When will a new agent appear on the case manager administration screen?

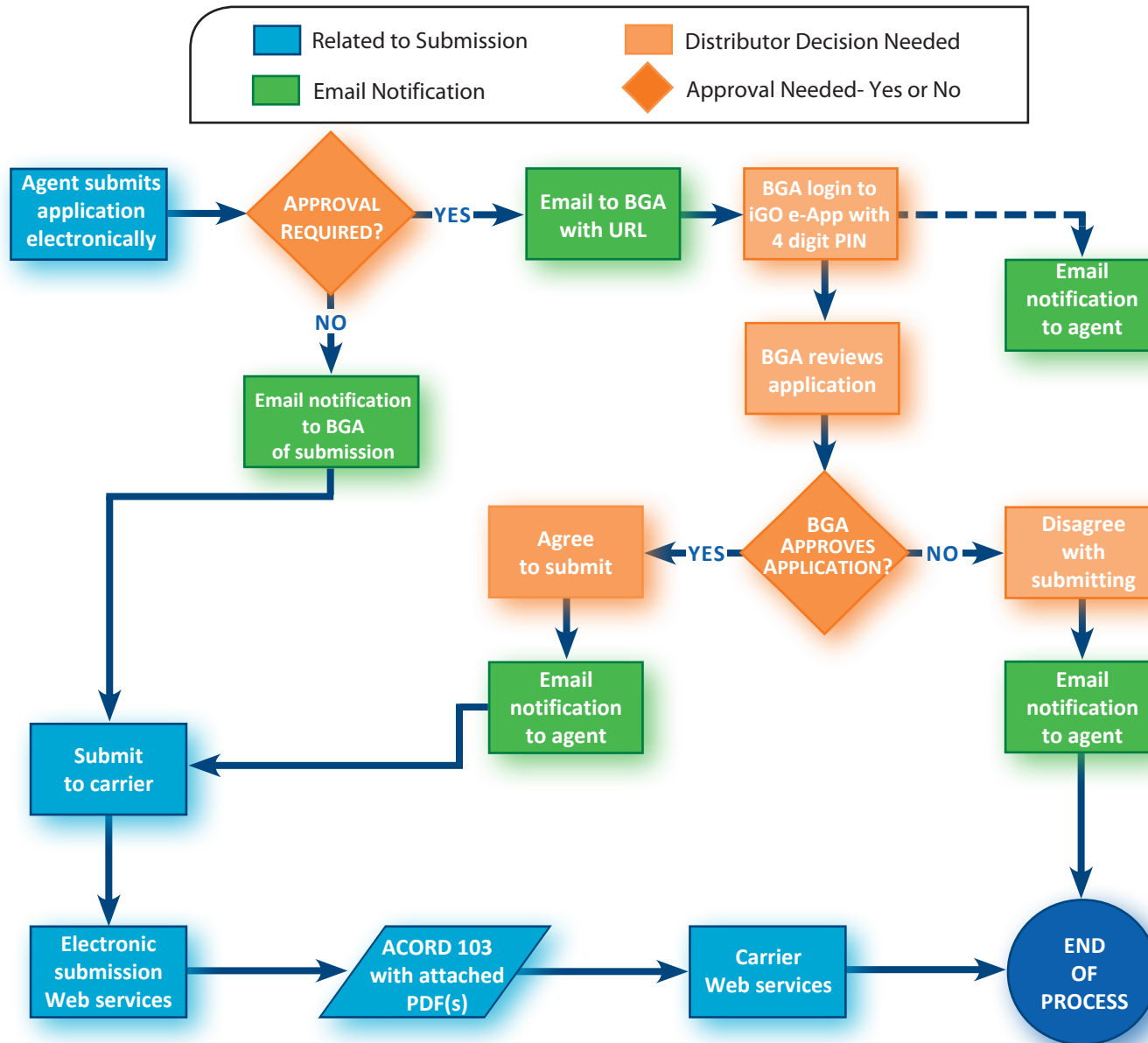
A new agent will display on the Case Manager Administration Screen after they login to iGO e-App.

Agent Login ID	Agent Name	Auto Sub	Case Manager First Name	Case Manager Last Name	Case Manager Email Address	Login PIN
GeEdwards_1581	Greg, Edwards					
Performance01_1581	Jocelle, Claire					
RHal_1581	Hal, Robert	True	Mary	Grant	mgrant@pipeline.com	4238
LKelly_1581	Kelly, Lisa	False	Mary	Thomas	mthomas@pipeline.com	4238
BGragan_1581	Brian, Gragan		Martha	Grisham	mgrisham@pipeline.com	9999
1581	Hunter, Scott					
JSmith_1581	Smith, James					
MBurk_1581	Burk, Mark					
mehea@pipeline.com	Mike, Mike					
NThomas_1581	Nancy, Thomas					
JGrant_1581	Jesse, Grant					
PKelly_1581	Pete, Kelly					
rgrisham0030	Grisham, Rich					
JStone_1581	Stone, Jennifer	True				
kevin1581						

*This is where the default administrator will go to assign a case manager to a particular agent. Here, the default administrator must decide where he or she would like an agent's e-submitted application to go via email— directly to a distributor case manager for GO/NO-GO approval or directly to the carrier.*



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**What is the GO/NO-GO workflow process for a case manager?**

1. The agent completes the application and collects all party signatures using iGO e-App.
2. Upon agent e-signature, the case manager will be notified of the new application to review. Bonus, bonus years
3. The case manager then reviews the application PDF and makes the decision to either approve or decline the application. It is very important that the case manager reviews the application within the pre-defined time period, as the application will be auto-submitted to the carrier without the case manager's approval if not reviewed within the required timeframe.
  - If the case manager approves and submits the application to the carrier, an e-mail notification will be sent to the agent, advising him/her that the application has been forwarded to the carrier.
  - If the case manager declines the application, an e-mail notification will be sent to the agent. If desired, the agent can:
    - Unlock the application (All signatures collected will be void)
    - Make any required changes and re-collect all party signatures
    - Submit for approval again

Contact sales@ipipeline.com or call (800) 758-0824 for more information.