

LincXpress® Tele-App Program

Frequently Asked Questions – updated effective November 11, 2019

Lincoln is committed to delivering a superior customer experience by making it easy for you and your clients to do business. With *LincXpress*® Tele-App, we've enhanced the submission process to offer more options and flexibility for your *Lincoln LifeElements*® Level Term and permanent UL, IUL and VUL life insurance cases.

Question	Answer
<i>LincXpress</i> Tele-App Program	
<p>What is <i>LincXpress</i> Tele-App?</p>	<p>The <i>LincXpress</i> Tele-App process is a streamlined, no-cost, ticket process for electronic ticket or paper ticket submissions. Following the Tele-App interview and underwriting of the case, signatures on the application and applicable non-solicitation forms will be obtained upon delivery of the policy.</p> <p>Paper and Electronic ticket submission is available for:</p> <ul style="list-style-type: none"> ○ <i>Lincoln LifeElements</i> Level Term ○ Permanent Life Insurance Products: <ul style="list-style-type: none"> ▪ Universal Life (UL) / Survivorship Universal Life (SUL) ▪ Indexed Universal Life (IUL) / Survivorship Indexed Universal Life (SIUL) ▪ Variable Universal Life (VUL) / Survivorship Variable Universal Life (SVUL)
<p>What are the advantages of <i>LincXpress</i> Tele-App?</p>	<p>Increased efficiencies with the <i>LincXpress</i> Tele-App process include a streamlined ticket process, in-house dedicated Lincoln Tele-App team, less paperwork, reduced NIGO (Not-In-Good-Order) submissions and lab-free consideration for qualifying cases.</p>
<p>Where is <i>LincXpress</i> Tele-App currently available?</p>	<p><i>LincXpress</i> Tele-App is available for all products, all ages and all face amounts in all states, except New York. Subject to product maximum ages and face amounts.</p> <p>Exclusions: <i>Lincoln LifeElements</i> One-Year Term, <i>Lincoln TermAccel</i>®, and <i>Lincoln MoneyGuard</i>®. Internal Exchanges/Replacements, Term Conversions and Reinstatements cannot be processed using <i>LincXpress</i> Tele-App.</p>
<p>Is <i>LincXpress</i> Tele-App the only way to complete and submit an application?</p>	<p>No, <i>LincXpress</i> Tele-App is a ticket submission process offered in addition to our traditional full application submission process. Unlike <i>LincXpress</i> Tele-App, the full application process will not include a Tele-App interview or the opportunity to have labs waived. Reference the Lincoln Life Application Comparison Summary for details [UW-APP-FLI001].</p>

<p>Can an informal Application (Trial) be followed by a Formal Application submitted via <i>LincXpress</i>Tele-App?</p>	<p>Yes, Lincoln will allow a <i>LincXpress</i> Tele-App ticket to be submitted for cases that were submitted first as a Trial. No requirements are waived in the process and the case will NOT qualify for the lab-free process if within 12 months.</p> <p>The Tele-App process cannot be used as a method to complete a trial quote.</p>
<p>What are the required forms for submission prior to the Tele-App interview?</p>	<ul style="list-style-type: none"> • eTicket or Paper Ticket • Authorization for Release of Information (HIPAA) • Receipt of Privacy of Lincoln Financial Group Privacy Practices Notice and Important Notice Acknowledgement Form • Replacement Form – LF10087 or state variation, needed whether replacement or not • Agent’s Report <p><i>*Additional forms may be required depending on the product, riders selected, contract state, etc. Please download and review the LincXpress Tele-App checklist [Form LF11276] from the Lincoln Form Tool to determine if additional forms may be required.</i></p>
<p>Why are signatures required up front for <i>LincXpress</i> Tele-App?</p>	<p>By collecting the signature up front, Lincoln ensures the solicitation paperwork is collected in-good-order and required documents have been delivered to the client. It also helps to avoid any potential delays throughout the process.</p>
<p>What is the compensation structure?</p>	<p>There is no change in the compensation structure for cases submitted using <i>LincXpress</i> Tele-App.</p>
<p>How is status information on <i>LincXpress</i>Tele-App submissions communicated?</p>	<p>You can access <u>up-to-date status</u> on your pending cases from the Lincoln Producer website or through the auto-generated status update emails.</p> <ul style="list-style-type: none"> • From the Pending Business section of Lincoln’s producer website, access the Pending Details tab of your policy to: <ul style="list-style-type: none"> ✓ View key dates and action items at-a-glance from the Case Tracker ✓ Quickly satisfy outstanding questions and/or requirements on a case ✓ Click-to-Chat in real-time with a New Business Associate to obtain answers on administrative questions for a specific case ✓ Easily download up to 5 issued policies at one time from the Pending List <p>Auto-Generated Email Notifications are sent within 1 hour of a status change on the pending policy and the Lincoln Tele-App Specialist will send emails to confirm:</p> <ul style="list-style-type: none"> • Receipt of ticket • Call attempts made to client • Interview scheduled • Interview completion
<p>Is Temporary Insurance available with <i>LincXpress</i> Tele-App?</p>	<p>Yes, temporary insurance is currently available with <i>LincXpress</i> Tele-App. The Temporary Insurance Agreement can be bound via EFT draft, Check or Credit/Debit Card. Premium is drafted at time of eTicket or paper ticket submission.</p> <p>Credit/Debit card payments are only available for Term products.</p>
<p>Can more than one agent be on the case?</p>	<p>Yes, up to four agents may be on each case. Please be sure to reference the correct agent code and split percentage.</p>

Can I submit a dual submission for a *LincXpressTele-App* policy and *Lincoln TermAccel* policy?

Yes, dual submissions are allowed when the client is planning to place both policies in force. Both should be submitted at the same time and Lincoln will coordinate the underwriting of both products. If labs have not yet been completed but are deemed necessary, Lincoln will order them on the *TermAccel* case as part of our automated process. Any medical information and labs collected during the *TermAccel* process can be leveraged for other life product submissions, making it easier for your client.

Can I use the *LincXpressTele-App* process for *Lincoln TermAccel* Level Term?

No. *TermAccel* is only available through electronic ticket submission with automated underwriting and requires eDelivery. Paper ticket submission, traditional underwriting and paper policy delivery is not available for *TermAccel*.

While the ticket and tele-app interview for *LincXpress Tele-App* and *TermAccel* are the same, due to a cost savings benefit associated with the *TermAccel* underwriting process, **we will not allow a product switch to *TermAccel* within 12-months of applying for a traditional product such as *LifeElements* Level Term.**

LincXpress Tele-App Paper Ticket Process

What products are available for paper ticket submission using *LincXpressTele-App*?

Paper Ticket submission:

- All Fixed and Variable Permanent Life Insurance Products, including UL, SIUL, IUL, SIUL, VUL, SVUL
- *Lincoln LifeElements* Level Term

This excludes *Lincoln LifeElements* One-Year Term, *Lincoln TermAccel*[®], and *Lincoln MoneyGuard*[®].

What is the process for submitting a paper ticket using *LincXpressTele-App*?

A paper ticket and accompanying solicitation forms may be submitted by fax, email, mail or secure file transfer through your regular channel to your dedicated Lincoln Leading-Edge Underwriting team.

Paper tickets and accompanying solicitation forms can be accessed on the Lincoln Forms Tool or iPipeline Forms Pipe. To generate Tele-App specific forms, simply select the "*LincXpress*" version of the product that your client is applying for (for example: *LifeElements* level Term (2017) – *LincXpress*).

The forms will be bundled into two distinct packages:

1. Core Applicant Package – Includes all forms and applicable state disclosures to leave with the applicant.
2. Core Ticket Package – Includes the five forms which are required PREINTERVIEW for every case.

A checklist has also been created to help identify any additional case specific forms needed prior to interview and prior to policy issue – download and review the *LincXpress Tele-App* checklist [Form LF11276] from the Lincoln Form Tool to determine if additional forms may be required.

What is the process for submitting a ticket for VUL products?

LincXpress Tele-App is available for all variable life insurance products. Please note that additional requirements are necessary and include:

- VUL/SVUL Allocation Form
- Customer Identity Verification Form
- Suitability Amendment (BJF-01003 or state variation) in all states except MA
- MA – Variable Life Insurance Suitability Supplement (LFF10687-26)

Please review the *LincXpress* Tele-App checklist [Form LF11276] to determine if additional forms may be required.

Prior to submission, please confirm with your broker dealer that this process is an approved form of submission and observe any back-office suitability requirements and firm-specific form requirements.

LincXpress Tele-App Electronic Ticket (eTicket) Process

What products are available as an eTicket for *LincXpress* Tele-App?

eTicket Submission:

- All Fixed and Variable Permanent Life Insurance Products, including UL, SIUL, IUL, SIUL, VUL, SVUL
- *Lincoln LifeElements* Level Term

Note: *Lincoln LifeElements* Level Term with *Conversion Products Enhancement* cannot be submitted electronically and will require a paper ticket to be used with the *LincXpress* Tele-App submission process.

How is an eTicket submitted using *LincXpress* Tele-App?

Submissions can be made by running a quote and submitting an eTicket. For permanent products, the agent can upload an illustration within the eTicket platform.

Existing iPipeline customers will have this ticket option available in the electronic process.

Non-iPipeline subscribers can access the electronic ticket option [at no cost] from the applicable Lincoln product pages within the Lincoln producer website.

Will the electronic ticket process work if the owner and insured are different? Are multiple owners allowed?

Yes, the process works if the owner and insured are different.

After eTicket submission, additional owners cannot be added (as the solicitation becomes void).

The electronic process allows for one trust as owner and up to three trustee signatures maximum. Multiple trusts as owners are not allowed.

What if the client does not have an email address? Can the eTicket still be submitted electronically?

No. Your client needs to agree to an electronic process to qualify for this program and a valid email address is required to complete the eTicket process.

<p>What if the agent fails validation during the licensing and appointment validation check?</p>	<p>When failing validation, the agent can continue to submit the case and the client will be contacted within a few short days after submission to schedule the <i>LincXpress</i> Tele-App interview. Licensing and appointments must be cleared prior to issue. In all instances:</p> <ul style="list-style-type: none"> • If agent validation is not cleared at the time of solicitation, a new ticket and interview may need to be completed. In pre-appointment states, if agent validation is not cleared at the time of solicitation, a new ticket and interview will need to be completed.
<p>What browsers are supported for electronic ticket submissions?</p>	<p>iPipeline continues to support new versions of the most popular web browsers, including:</p> <ul style="list-style-type: none"> • Microsoft Internet Explorer (8,9,10,11) • Firefox (for Windows) • Apple Safari (for Mac and iPad) • Google Chrome (for Windows) <p>Regarding 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.</p>
<p>What happens if a message from the internet browser’s pop-up blocker appears while submitting an electronic ticket?</p>	<p>Click “Always Allow” and this will enable the process to continue.</p>

LincXpress Tele-App Interview Process

<p>Why is the <i>LincXpress</i> Tele-App interview required?</p>	<p><i>LincXpress</i> Tele-App is designed to be quick and efficient and the answers obtained through the Tele-App interview will populate the required application package.</p> <p>Completing the interview eliminates delays in the process and reduces the effort and paperwork traditionally required by the producer.</p>
<p>How does the <i>LincXpress</i> Tele-App Interview get scheduled?</p>	<p>When case is deemed ‘in good order’, an email will be sent to your client with a link to Lincoln’s Online Scheduling Tool to schedule their Tele-App interview at a time that’s convenient for them. If no appointment is scheduled within 24-48 hours, a Lincoln in-house Tele-App Specialist will call the client to schedule. The client can also reschedule or cancel their Tele-App appointment using the online scheduling tool.</p> <p>An appointment reminder is available for the client upon request, via text message or email.</p>
<p>What can the client expect during the <i>LincXpress</i> Tele-App interview?</p>	<p>The interview is expected to take between 30-40 minutes. Preparation is key to ensure that the process goes smoothly. To prepare for the interview, Lincoln has created a worksheet to assist your client [UW-TELE-FLI003]. Some of the items the client should be prepared to discuss include: medical history including diagnosis; symptoms and conditions in the last 10 years; doctor visits; hospital and medical facility visits; employment and income; tobacco and alcohol use; hobbies/avocations; beneficiaries’ social security numbers and existing policy information.</p> <p>For clients age 70 and above, in addition to the Tele-App interview, there will be a separate interview to complete the age and amount required for the Older Age Personal History Interview (PHI).</p>

What are the hours for the *LincXpress*Tele-App team?

Standard business hours:

- Monday-Thursday: 8:00 am to 9:30 pm ET
- Friday: 8:00 am to 8:00 pm ET

However, we will schedule calls at a time that is convenient for the client, including weekends.

Are there foreign language speaking *LincXpress*Tele-App Specialists?

No, *LincXpress* Tele-App Interviews are only conducted in English at this time. A translator cannot be used, and it is important that the client can speak and understand English.

LincXpress Tele-App Underwriting

How are *LincXpress* Tele-App cases underwritten?

There are two underwriting methods, both leveraging Lincoln’s Underwriting Guidelines, for *LincXpress* Tele-App submissions.

The underwriting method will be determined based on the following case criteria:

	Automated Underwriting	Traditional Underwriting	
Product	<i>Lincoln LifeElements</i> Level Term and single-life UL, IUL, VUL products	<i>Lincoln LifeElements</i> Level Term and single-life UL, IUL, VUL products	All Survivorship Permanent Products: SUL, SIUL, SVUL
Age	18-60	60+*	All ages*
Face Amount	\$1 million or less	Over \$1 million*	All face amounts*

*Subject to product guidelines for age and face amounts.

What is Automated Underwriting?

Automated Underwriting is a seamless underwriting process where cases are processed straight-through and do not require a traditional underwriting review. However, there may be some instances in which the rules engine would pause the automated process and refer the case to an Underwriter for further review.

The Automated Rules Engine follows the same philosophy as traditional underwriting and is aligned with Lincoln’s current underwriting guidelines.

Can I still work with my dedicated underwriter on cases that go through the Automated Underwriting process?

Yes. All single-life term, UL, IUL and VUL cases ages 18-60 with face amounts of \$1million or less submitted through the Tele-App process will go through Automated Underwriting, however you may contact your dedicated Underwriting team with any questions related to your case.

If during these conversations, additional underwriting-related information is received outside of the automated process, the Underwriter will pause the automation for an assessment to be made as to whether the information has underwriting significance. If yes, the case would then require a manual Underwriting review.

Can I speak with an underwriter if I want to negotiate an underwriting offer for a case that went through Automated Underwriting?

Yes, a leading-edge Underwriter will be available to review a medical Underwriting decision on a case-by-case basis.

<p>What situations would cause the Automated Rules Engine to refer the case to an Underwriter for further review?</p>	<p>This list not all inclusive, however some of the commons reasons the Rules Engine would refer a case to an Underwriter for further review include:</p> <ul style="list-style-type: none"> • Medical impairments that the Rules Engine is not able to evaluate • MIB codes of concern • Pharmacy database results which indicate a significant risk • Lab results outside normal range • Underwriting related information provided to Lincoln outside of the automated process
<p>If my case qualifies for Automated Underwriting and my client has previously completed labs with another carrier, can they be submitted to Lincoln for review?</p>	<p>For a <i>LincXpress</i> Tele-App case submission, the Underwriter will have the ability to pause the automation process, so a decision can be made whether to use prior labs.</p> <p>If prior labs will be used, the automated system will not auto-order labs and the case will require a manual Underwriting review of the labs for final approval.</p> <p>[Note: Outside labs cannot be submitted or used for <i>Lincoln TermAccel</i> cases.]</p>
<p>For cases going through Automated Underwriting, can Lincoln provide the reason for the offer received?</p>	<p>Yes. The rules engine will identify the reason for the rating and the Underwriter will have the information regarding our final assessments. This information will be available for discussion upon request.</p>
<p>Can my client opt-out of Automated Underwriting?</p>	<p>No. If the case is eligible for Automated Underwriting, the case will automatically follow that process and be assessed with a decision made by the Automated Rules Engine.</p> <p>The agent can guarantee a full file review of the case by submitting a traditional paper application or an eApp.</p>
<p>Is an APS required for <i>LincXpress</i> Tele-App submissions and if so, who orders it?</p>	<p>After the initial review of the <i>LincXpress</i> Tele-App interview is complete, the underwriter will advise whether an APS is needed. If the agency orders the APS today, that process will continue.</p> <p>For <i>LincXpress</i> cases that go through the Automated Underwriting process, there may be instances in which the automated rules engine will refer the case to an underwriter for further review. The underwriter would then advise whether an APS is needed.</p>

LincXpress Tele-App Underwriting: Ordering Labs

Did you know that your client may qualify for the Lab-Free process?

<p>Are labs required in addition to the <i>LincXpress</i> Tele-App interview?</p>	<p>During the <i>LincXpress</i> Tele-App interview, Lincoln is gathering some information traditionally requested in an exam, including requesting vitals and physical measurements from the client over the phone.</p> <p>If it's determined that the client qualifies for the lab-free process, a traditional full exam is not needed.</p> <p>If labs are required, the agency will be notified, and Lincoln will order the necessary labs and vitals.</p>
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<p>What is the lab-free process?</p>	<p>The opportunity to waive labs is exclusively available for eligible <i>LincXpress</i> Tele-App and Lincoln <i>TermAccel</i> applications. This lab-free opportunity is available for all products within established guidelines (excluding Lincoln <i>MoneyGuard</i>®/full list of exclusions below).</p> <p>As part of the lab-free process, Lincoln will leverage data from traditional underwriting sources, information provided during the Tele-Interview, and other underwriting technology to determine if labs are required. The decision will be made within a few days of interview completion. Participation in the program is automatic; there is no need to opt-in.</p> <p>This program is designed to identify those clients who are the healthiest risks [Preferred Plus, Preferred and most Standard rate classes] and will allow a more streamlined path of underwriting for those individuals.</p> <p>Program Exclusions:</p> <ul style="list-style-type: none"> • New York applications • Lincoln <i>MoneyGuard</i> product submissions • Traditional Full Paper Application and eApplication submissions • Guaranteed and Simplified Issue • Exchanges and Conversions • Lincoln <i>LifeElements</i>® One-Year Term • Prior submissions, including trial or formal applications, received in the past 12 months* <p><i>* Any trial or formal submitted in the last 12 months will be reviewed for use of prior medical information in the underwriting decision. Due to prior information on file, these cases will not be considered for the lab-free rules engine; however, if we have enough evidence in the prior file to issue without additional medical information, we will proceed.</i></p>
<p>Which clients can qualify for the lab-free opportunity?</p>	<p><i>Lincoln LifeElements</i> Term and Permanent Life Insurance Products <u>submitted through <i>LincXpress</i> Tele-App ONLY:</u></p> <ul style="list-style-type: none"> • Insureds age 18-60 • Face amounts of \$1 million or less • Consideration for all preferred plus, all preferred and most standard rate classes
<p>How can my client opt-in for lab-free consideration?</p>	<p>Qualifying cases submitted via electronic or paper ticket through <i>LincXpress</i> Tele-App will automatically go through the lab-free assessment process and the rules engine will determine if labs are required.</p>
<p>What tools are available to find out if my client may qualify for the lab-free process?</p>	<p>A lab-free prequalification checklist is available for your reference: [UW-NOLAB-FLI001].</p>
<p>Will I be notified if labs are needed?</p>	<p>Within a few short days after completion of the Tele-App Interview, the agent will be notified via email advising if labs have been waived or are required for the client. If labs are required Lincoln will order the necessary labs and vitals.</p>
<p>What happens if my client does not qualify for the lab-free process?</p>	<p>If the client does not qualify for the lab-free opportunity, Lincoln will notify the agent after the completion of the Tele-App Interview confirming that the abbreviated exam has been ordered for the Insured through ExamOne.</p>

<p>What if my client did not qualify for lab-free but meets the general qualifications of the lab-free process?</p>	<p>There are many situations which will require the need for labs. However, to effectively monitor the quality of the automated rules engine and ensure Lincoln continues to meet expected mortality results for <i>LincXpress</i> Tele-App submissions, a random selection of cases will automatically have an abbreviated exam ordered for the client. This random selection may include cases which would have otherwise qualified for the lab-free process. The abbreviated exam does not include full underwriting or the review of an APS.</p>
<p>Is the lab-free process available for survivorship products?</p>	<p>Yes, total face amount per policy is \$1million and both clients must qualify for the program.</p>
<p>If labs are required, can the producer set up the exam?</p>	<p>Lincoln will order labs and vitals, if they are required. The application and medical supplement are being completed by Lincoln's Tele-App Specialist during the <i>LincXpress</i> Tele-App interview. The lab work - including vitals, labs and physical measurements - are the only remaining requirements. To deliver a streamlined experience, Lincoln will order the abbreviated exam at the completion of the Tele-Interview.</p>
<p>Can an exam for another company be used?</p>	<p>To deliver a streamlined experience, Lincoln will order the labs and vitals after the Tele-Interview is completed, unless acceptable results are already in possession.</p> <p>If lab work was previously completed within the last 12 months for ages up to 69 and in the last 6 months for ages 70+, you may attach the lab slip, exam and/or medical records with the ticket.</p>
<p>What company is used to collect labs and vitals?</p>	<p>ExamOne is the company who collects the labs and vitals. The vendor that processes the lab results is CRL Labs.</p>
<p>Can the client access the labs?</p>	<p>Yes. Clients can securely access lab results at no cost through the designated online lab service website for Lincoln ordered labs. The online portal provides clients with their results faster and in a consumer-friendly format that provides greater detail and information on each result. Information will be provided to the client directly about viewing their lab results online.</p>
<p>Will Lincoln share the lab results?</p>	<p>Yes, upon request, the Lincoln lab and exam results will be shared with the agency.</p>
<p>What should I inform my client about the underwriting process?</p>	<p>Lincoln will review the information obtained through the Tele-App Interview. If additional information is needed to reach an underwriting decision, your client will be contacted by ExamOne within a few short days to schedule a brief lab exam including a check of their vitals (pulse, blood pressure) as well as blood and urine samples. If labs are waived and no additional information is needed, the application will follow the normal approval and issue process.</p>

Electronic Policy Delivery (eDelivery)

<p>Is eDelivery mandatory for <i>LincXpress</i> Tele-App cases?</p>	<p>No. eDelivery is an optional – same day – policy delivery method that is available to you and your client at <u>no cost</u>.</p>
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<p>Why should my client consider eDelivery?</p>	<p>eDelivery is a quick and secure electronic delivery process that offers faster turnaround times. Clients will receive same day delivery of issued policies and quicker revisions, if needed. Other advantages include:</p> <ul style="list-style-type: none"> • Available at no cost • 24/7 access to view policies • Expedited compensation payouts • eSignature capability eliminates postage and paperwork 				
<p>How do I sign up for eDelivery?</p>	<p>There are two methods available for eDelivery of <i>LincXpress</i> Tele-App cases:</p> <table border="1" data-bbox="676 391 1999 813"> <thead> <tr> <th data-bbox="676 391 1314 423">Lincoln advisor portal method</th> <th data-bbox="1314 391 1999 423">iPipeline and DocFast® method</th> </tr> </thead> <tbody> <tr> <td data-bbox="676 423 1314 813"> <ol style="list-style-type: none"> 1. Sign up on your Lincoln producer website. * 2. Elect eDelivery option on case-by-case basis. Default is not available. 3. Agency/agent logs in to pending website to print PDF. 4. Wet-signed documents are sent back to Lincoln through normal paper transmission for placement review. <p>*Producer access through LFD.com or the Lincoln Solutions Center (varies by distribution channel). This method is not available for delivery of <i>Lincoln TermAccel</i>® policies. <i>Lincoln TermAccel</i> must be eDelivered via the DocFast method.</p> </td> <td data-bbox="1314 423 1999 813"> <ol style="list-style-type: none"> 1. Register for DocFast setup at LincolnFinancial.com/eDelivery. 2. Complete contact information and user registration. 3. Sign up for a training session at LincolnFinancial.com/eDeliveryTraining. 4. For training resources, including instructional videos and cheat sheets, visit LincolnFinancial.com/eDeliveryResources. </td> </tr> </tbody> </table> <p>For more information on eDelivery, view the overview flier. [LIF-eDEL-FLI002]</p>	Lincoln advisor portal method	iPipeline and DocFast® method	<ol style="list-style-type: none"> 1. Sign up on your Lincoln producer website. * 2. Elect eDelivery option on case-by-case basis. Default is not available. 3. Agency/agent logs in to pending website to print PDF. 4. Wet-signed documents are sent back to Lincoln through normal paper transmission for placement review. <p>*Producer access through LFD.com or the Lincoln Solutions Center (varies by distribution channel). This method is not available for delivery of <i>Lincoln TermAccel</i>® policies. <i>Lincoln TermAccel</i> must be eDelivered via the DocFast method.</p>	<ol style="list-style-type: none"> 1. Register for DocFast setup at LincolnFinancial.com/eDelivery. 2. Complete contact information and user registration. 3. Sign up for a training session at LincolnFinancial.com/eDeliveryTraining. 4. For training resources, including instructional videos and cheat sheets, visit LincolnFinancial.com/eDeliveryResources.
Lincoln advisor portal method	iPipeline and DocFast® method				
<ol style="list-style-type: none"> 1. Sign up on your Lincoln producer website. * 2. Elect eDelivery option on case-by-case basis. Default is not available. 3. Agency/agent logs in to pending website to print PDF. 4. Wet-signed documents are sent back to Lincoln through normal paper transmission for placement review. <p>*Producer access through LFD.com or the Lincoln Solutions Center (varies by distribution channel). This method is not available for delivery of <i>Lincoln TermAccel</i>® policies. <i>Lincoln TermAccel</i> must be eDelivered via the DocFast method.</p>	<ol style="list-style-type: none"> 1. Register for DocFast setup at LincolnFinancial.com/eDelivery. 2. Complete contact information and user registration. 3. Sign up for a training session at LincolnFinancial.com/eDeliveryTraining. 4. For training resources, including instructional videos and cheat sheets, visit LincolnFinancial.com/eDeliveryResources. 				
<p>Who do I contact if I have issues with eDelivery?</p>	<p>Please contact your Lincoln sales representative or New Business team with any questions.</p>				
<p>If I am an iPipeline subscriber and have questions or issues with the DocFast system, who do I contact?</p>	<p>iPipeline subscribers should contact iPipeline Production Support directly at: Email: support@ipipeline.com Phone: (800) 641-6557, Option 3. Monday -Friday 8:00am- 7:00pm ET</p>				

Contact your dedicated Lincoln Underwriting & New Business team with additional questions.

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