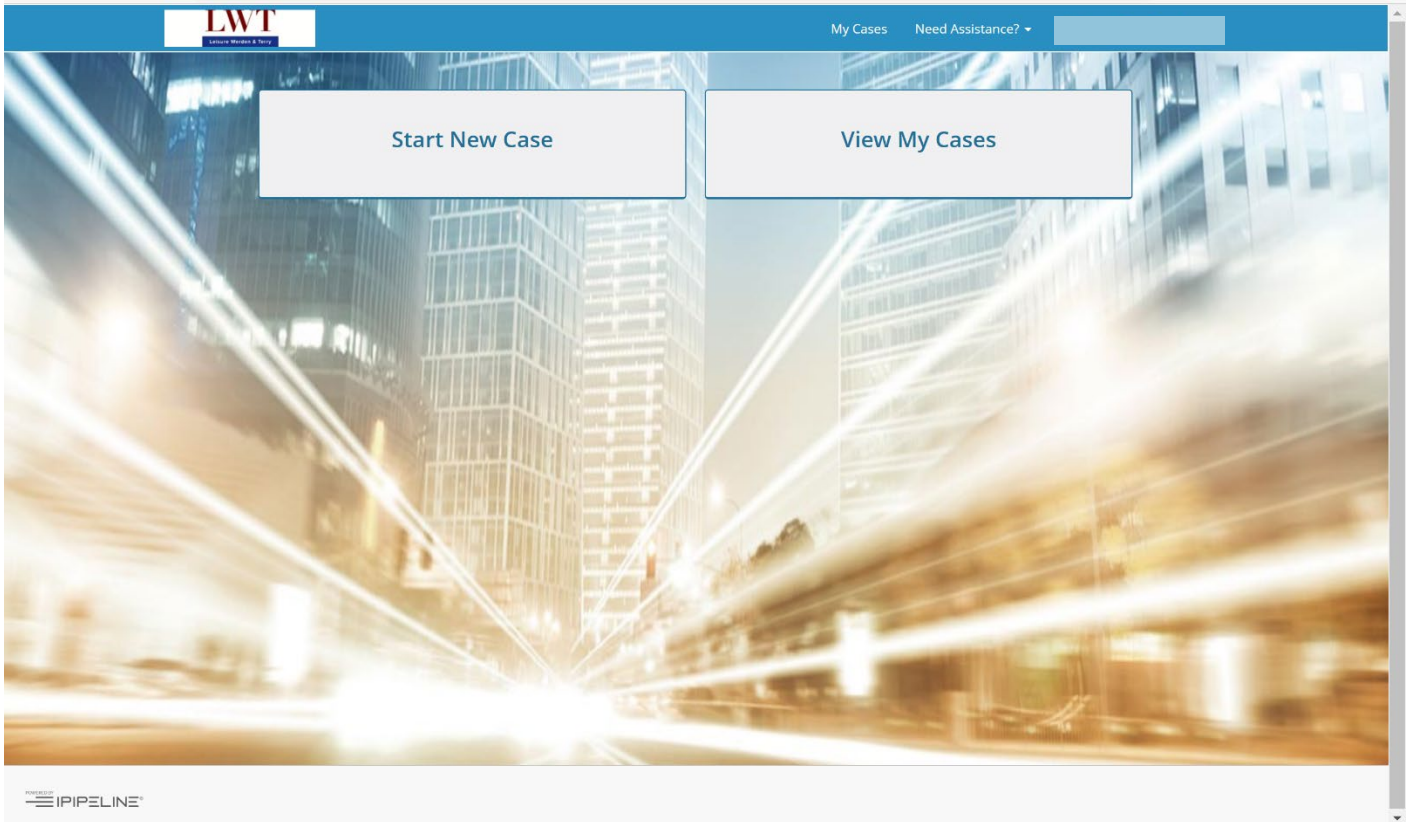


How to Enter a Case in iGo


Once you have logged into iGo,
you will come to the homepage, which looks like this:



Here, you either start a new case or view/edit an existing one.



When you start a new case, you will be prompted to enter basic case information such as name, DOB, Gender, State, Product Type, and Find the Available Products.

My Cases Need Assistance? ▾

Start New Case

Case Information

Status Started	Agent of Record Select Agent	Date Modified 06/29/2020
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Proposed Insured

First Name

Last Name

Date of Birth

Age

Gender

Case Description

(Examples: \$500,000.00, Kid's Policy, Business Policy, etc)

Carrier and Product

State:

Product Type

Product

- Please choose State and Product Type above and click "Find Available Products"

At the "Product Type" field, you will see a dropdown list of choices.

LWT
Lynch Weston & Terry

My Cases Need Assistance? ▾

Start New Case

Case Information

Status Started	Agent of Record Select Agent	Date Modified 06/29/2020
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Proposed Insured

First Name: Valued Last Name: Client

Date of Birth: 08 / 09 / 1985 Age: 35 Gender: **Please select...**

Case Description: \$1 million 20 year term / Personal case
(Examples: \$500,000.00, Kid's Policy, Business Policy, etc)

Carrier and Product

State: California


Product

- Please choose State and Product Type above and click "Find Available Products"

Gender dropdown menu:

- Please select...
- Term Life
- Universal Life
- Disability Products
- Accident
- Indexed Universal Life
- Survivorship Universal Life
- Variable Universal Life
- Accidental Death
- Term Life/ Alternative to Term

Find Available Products



Click on "Find Available Products" to see carrier/product choices.

LWT
LIFE, WELLNESS & FINANCIAL

My Cases Need Assistance? ▾

Start New Case

Case Information

Status Started	Agent of Record Select Agent	Date Modified 06/29/2020
--------------------------	--	------------------------------------

Proposed Insured

First Name
Valued

Last Name
Client

Date of Birth
08 / 09 / 1985

Age
35

Gender
Female ▾

Case Description

\$1 million 20 year term / Personal case
(Examples: \$500,000.00, Kid's Policy, Business Policy, etc)

Carrier and Product


State:
California ▾

Product Type
Term Life ▾

Find Available Products

Product











- Please choose State and Product Type above and click "Find Available Products"



After clicking “Find Available Products,” you will see a dropdown list of carriers, products and the available digital processes (ie., a full e-application, a drop ticket, and/or accelerated underwriting). Click “Select” next to your choice.

State: Product Type:

Product

Carrier	Product	Quotes/ Illustrations	IGO e-App
	Select-a-Term (eApp)		<input type="button" value="Select"/> e-Sign
	Select-a-Term (Ticket)		<input type="button" value="Select"/> e-Sign
	Term Life Insurance		<input type="button" value="Select"/> e-Sign
	AppAssist Forms		<input type="button" value="Select"/> e-Sign
	John Hancock Term with Vitality		<input type="button" value="Select"/> e-Sign
	Protection Term		<input type="button" value="Select"/> e-Sign
	Term Drop Ticket		<input type="button" value="Select"/> e-Sign
	Lincoln LifeElements Level Term 2019 (eApp-Full Application)		<input type="button" value="Select"/> e-Sign
	Lincoln LifeElements Level Term 2019 (eTicket-LincXpress)		<input type="button" value="Select"/> e-Sign
	Nationwide (Intelligent Underwriting) YourLife Guaranteed Level 10-year Term		<input type="button" value="Select"/> e-Sign

Pick a Carrier, Product and Process

Once you click on "Select," a new "Application" tab will open.

John Hancock INSURANCE

My Cases Need Assistance? [Dropdown]

Client, Valued John Hancock | Term Drop Ticket | Save View Forms Case Actions [Dropdown]

Case Information **Application**

Insured Information

- Beneficiaries
- Coverage Details
- Payment Information
- Existing Coverage
- Agent Information
- Agent Attestation

Insured Legal Name

First: Valued | M.I.: | Last: Client

Date of Birth: 03/09/1985 | Age (Nearest): 35

Sex: Male Female | Social Security Number: [Masked]

E-Mail Address: [Empty]

Phone Number: [Masked]

Address

Street: [Empty]

PIPELINE

