American Insurance Administrators, Inc.

eApp

Frequently Asked Questions

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Frequently Asked Question Answers

A1:   There are a few reasons why this can happen:

1.   If you click the browser's 'Back' button while you were completing the application, eApp will return to the previous webpage without saving (updating) the data.   You must click the 'Update' link to save all of the information on the application page before leaving the application.

2.   If you are inactive while using the system for more than 60 minutes, eApp will terminate your session and all of your data will be lost.   eApp will provide you warnings prior to terminating your session.

3.   If you click 'Cancel before you click 'Update' while you are entering an application, eApp will return you to the Dashboard without saving your data.   Always click 'Update' before returning to the Dashboard if you want to save the current data.

4.   If you press the 'Backspace' key excessively in an entry field, it will act similar to your browser's 'Back' button returning you to the Dashboard without saving your data.   Make sure you only press 'Backspace' enough times to clear out the current field.

5.   Refreshing your browser page before clicking the 'Update' link will cause your browser to lose the data you entered and present you with an empty form.

Return to Top

American Insurance Administrators, Inc.

A2:   The electronic signature process is similar to a hand written signature process where each person signs the application sequentially.   On a "dual application" (two applicants on the same application), the Agent will be the first to electronically sign the application followed by Applicant A (left side of app) and then Applicant B (right side of app).   On a single applicant application, the process is the same except that Applicant B will not be asked to sign.   The signature process will be complete after Applicant A electronically signs.

After the Agent has finished the application interview with the client and all required data in entered into the eApp, the Agent will switch the application status from "In-Progress" to "Complete" and click update.   This will start the process of generating the submittal application in "pdf" format.   The submittal application is then transmitted to Echosign for signatures.   Echosign™ is our selected third party document verification website.

Once the application is received by Echosign™, their services will generate and send an email to the Agent providing a link for the agent to click that will lead them to the electronic signature website for the subject document.   Echosign™ will not generate and send the signature request email to Applicant A until the Agent has completed the signature process.   Likewise, Echosign™ will not generate and send the signature request email to Applicant B until the Applicant A has completed the signature process.

After all signatures have been completed through Echosign™, their web service will generate an email notifying all parties that the application has been signed and submitted.   If you do not receive this final email, the signature process has not been completed correctly by all parties required to sign this application.   Also note that once this final email arrives there is a minimum 2 hour verification delay before your application will arrive at the processing center.

Return to Top

A3:   There are a number of possible causes for this issue depending if you are the Agent or the Applicant:

   If the Agent has not received the email:

1. Depending on your email provider, network service, your computer or mobile device there could be a delay in receiving the email of up to 10 minutes.   While you are waiting, check the following items as well.
      A. Check your spam and junk mail folders for the "No Reply [echosign@echosign.com]" email.
      B. Verify the carrier has your valid email address on file in the 'Licensing Records'.

American Insurance Administrators, Inc.

eApp accesses the information on file with the carrier so you only have to maintain this data in one place.   Call the Licensing Department for the carrier if you need to update your email address.

If the Applicant has not received the email:

1. The Agent should verify the applicant's email address that was entered on the application.   You can test the address from your email account.
2. Ask the client/applicant to check their spam and junk mail folders for the "No Reply [echosign@echosign.com]" email address.
3. First, you, the agent signs the application.   Next, Echosign sends an email to the first applicant prompting them to sign the application.   Finally, Echosign sends an email to the second applicant (if applicable) and prompts them to sign the application.

Return to Top

A4:   If you have started an application for a particular state and did not save the data or you have not filled in the First and Last Name fields on an application, "Not Complete" is added to these fields indicating that this is an available application.   This unused application is available for you to use for a future client.   To reuse this application, click the 'Edit' link next to application and then enter the client information.   In addition, you may also delete this entry by clicking the 'Details' link next to the application, scrolling to the bottom of the application, and then clicking 'Delete'.

Return to Top

A5:   "Updating" an applications status from 'In-Progress' to 'Complete' caused eApp to perform data validation functions on the filled out application.   The red text appearing at the top of the application after the validation process indicates errors that exist in the body of the application.   An application cannot be submitted either electronically or by mail if these errors exist.   A large red asterisk (*) is displayed next to each field that contains an error or is incomplete.   Scroll through the application slowly to find the validation error marks (*) and correct the information.

Return to Top

A6:   Echosign will send an email to everyone involved in the 'signature process' notifying them that the application signature process has been completed by all parties.

In addition, for electronically signed applications you can access your eApp Agent Dashboard and look for the word "signed" in the status column next to the application in question. Hand-written signature applications will have a status of 'signed' next to them if everyone involved in the signature process has digitally assigned their signature to the application (Hand-written signature applications will need to have the status changed from 'completed' to 'signed' once all of the signatures are obtained).

Return to Top