05-28-2025 - Quote - iSolve Release Notes

Product release notes for all products can be viewed on the iPipeline **_Customer Portal_**. To receive automatic notifications when new release notes are published, log onto the iPipeline Customer Portal, go to _Resources > Release Notes_ and select the product(s) that you would like to receive notifications for.

iSolve: May 2025 Release 🔗

Release Date: May 28, 2025

> ℹ️ **Note:**
> - _Core feature_ = feature is active for applicable users automatically (some configuration may be needed / desired)
> - _Exploitable feature_ = feature can be turned on / off by the client

NEW FEATURES / ENHANCEMENTS 🔗

Refine LTC or chronic illness riders for compliant illustrations with _Run Illustration_ 🔗

Impacts / Availability: Core Feature

Overview: Long-term care and chronic illness rider quoting was added to iSolve in late 2024. On the quote results page, all products that have an appropriate rider are shown with the rider enabled, always with a 4% monthly benefit if the product supports it. Now when creating a compliant illustration via the _Run Illustration_ action on the iSolve quote results page, you may now refine the LTC rider further for your client-specific, state-specific custom illustration. You can choose from other (than 4% monthly) benefits amounts offered by the carrier, and change the rider underwriting class to something other than the underwriting class for the base life insurance coverage.

New fields available for _Run Illustration_ with an LTC or chronic illness rider

Chose an LTC or chronic illness rate class that differs from the base coverage (morbidity vs. mortality)

See the changes reflected in the resulting compliant illustration PDF

Benefit(s): For many distributors, a large majority of permanent insurance illustrations also include a long-term care or chronic illness rider. If the agent desires to quote a benefit percentage other than 4% or the client's rider rate class is different from their life insurance rate class, they previously had to leave iSolve to get the compliant illustration from the illustration software on the carriers website or ask an illustration sales support specialist to provide it. Now, agents can make these small changes all on their own directly within iSolve, which leads to new efficiencies and speeds up the entire life insurance sales process.

Quote products that have both an LTC rider and a chronic illness rider 🔗

Impacts / Availability: Core Features

Overview: iSolve insurance products that offer both a long-term care rider type *and* a chronic illness rider type can now offer the results of both rider types in iSolve. Previously, the feature was limited to one rider per insurance product.


Quote results sample of the same product with both LTC or chronic illness riders

Benefit(s): If a product offers both an LTC *and* chronic illness rider, agents using iSolve have the ability to consider that same product regardless of which rider type is recommended for the current client.
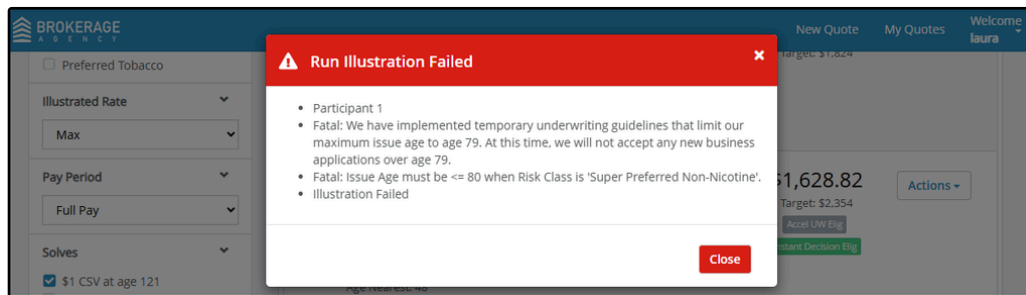
New and improved in-app messaging 🔗

Impacts / Availability: Core Feature

Overview: New and improved in-app notifications and messaging to better inform users of issues and errors.
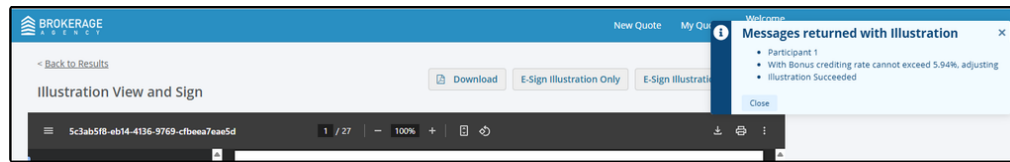
Run Illustration Success messaging with illustration engine details

Detailed *Run Illustration* failure messaging

Benefit(s): In-app messaging will become especially important in iSolve as iPipeline continues to extend the capabilities of the *Run Illustration* action to give agents and sales support representatives more flexibility. The increased flexibility also increases the potential for the iSolve user to create scenarios for which a compliant illustration cannot be generated.