

iGO Evolve 3.7 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.

iGO Evolve: 3.7 RELEASE

Release Date: January 22, 2026

Note:

- *Automatic feature* = feature is automatically available with base upgrade
- *Requires Activation* = feature must be turned on / configured (an additional cost may apply)
- *Requires Changes* = feature requires the client to make changes to existing implementation to avoid errors / loss of product performance (see the [Requires Changes](#) section below for details on any required actions).

NEW FEATURES / ENHANCEMENTS

Updates to Term Drop Ticket Individual Owner

Impacts / Availability: Automatic feature

Overview: A number of enhancements were made to our Foundational Term Drop Ticket to improve data collection needed across the market. Please review below for the updates made to the Term Drop Ticket.

- Updates to the Individual Owner:
 - Addition of Drivers License question set
 - Addition of Citizenship question set
 - Update of the ACORD 121 to include data from the Driver's License question set
 - Update of the ACORD 121 to include data from the Citizenship question set

Benefit(s): These updates provide increase out of the box data collection to reduce implementation efforts and improve speed to market.

Contact: Existing iGO Evolve customers contact your Professional Services representative. All others please contact your Sales or Customer Success representative.

Updates to Term Drop Ticket Trust Owner

Impacts / Availability: Automatic Feature

Overview: A number of enhancements were made to our Foundational Term Drop Ticket to improve data collection needed across the market. Please review below for the updates made to the Term Drop Ticket.

- Updates to Trust Owner:
 - The following fields have been changed to Not Required:
 - Type of Trust
 - Name of Grantors
 - Can Trustees act independently?
 - The following question has been added to Trust Owner
 - Number of Trustees
 - Update to the ACORD 121 to include this new field

Benefit(s): These updates provide increase out of the box data collection to reduce implementation efforts and improve speed to market.

Contact: Existing iGO Evolve customers contact your Professional Services representative. All others please contact your Sales or Customer Success representative.

Update to Coverage Information for Life Products

Impacts / Availability: Automatic Feature

Overview: An additional question was added to the Coverage Information Screen for Foundational Life Products to improve data collection needed across the market.

- Updates to Coverage Information Screen
 - Addition of “Temporary Insurance Agreement request?” question
 - Update to the ACORD 103 and ACORD 121 to include this data captured

Benefit(s):These updates provide increase out of the box data collection to reduce implementation efforts and improve speed to market.

Contact: Existing iGO Evolve customers contact your Professional Services representative. All others please contact your Sales or Customer Success representative.

Update to Final Expense

Impacts / Availability: Automatic Feature

Overview: An additional question was added to the Final Expense Foundational Products to improve data collection needed across the market.

- Add Rating Class to the Coverage Information Screen for Final Expense

Benefit(s):These updates provide increase out of the box data collection to reduce implementation efforts and improve speed to market.

Contact: Existing iGO Evolve customers contact your Professional Services representative. All others please contact your Sales or Customer Success representative.

FIXES

- **Inconsistent check boxes mapping color:** This fix resolves an issue where the color check boxes were mapped to forms was not consistent with the font color used for mapping the other data fields/object within the form
- **Update Phone Number format for form mapping:** This fix resolves an issue where phone numbers were mapped without the traditional phone number format.
- **Update Max Length for Routing Number:** This fix resolves an issue where a max length for the routing number on the Payment screen was not properly set.