

04-14-2026 DocFast 14.0.0 Release Notes



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DocFast: 14.0.0

Release Date: April 14, 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

Private Attachment Enhancement

Impacts / Availability: This new enhancement Requires Activation/Configuration from your Professional Services team.

Overview: Consumers can now view required private attachment documents from a custom screen earlier in the process, rather than only after completion. This ensures important information is reviewed at the right time, helping consumers feel informed and confident before eSigning.

Benefit(s): This enhancement improves transparency by ensuring consumers can review important suitability documents *before* committing to eSign. It increases confidence and trust in the signing process while reducing the likelihood of follow-up questions or rework. It also helps organizations meet compliance expectations by confirming documents are presented at the appropriate point in the customer journey.

Contact: If you would like to learn more about this new enhancement, please contact your Professional Services team member.

AlphaTrust Integration Enhancement

Impacts / Availability: This is an organic feature that is automatically available with no configuration needed. This enhancement is for carriers that use AlphaTrust for eSignature as part of the eDelivery workflow.

Overview: We've updated the AlphaTrust API endpoints used by DocFast to the latest URLs. This change improves reliability and alignment with AlphaTrust's current API standards while maintaining existing functionality.

Benefit(s): This update improves system reliability by aligning DocFast with AlphaTrust's current, supported API endpoints. It provides more stable and seamless signing experience with no change to existing workflows.

FIXES

- **Issue Title:** (*Agents*) We fixed an issue where some instances policies that were printed for hand delivery continued to appear in agent alert dashboards after reaching their final status. Alerts are now properly cleared for all users when a policy is printed for hand delivery, ensuring dashboards accurately reflect current policy status. This prevents confusion and helps agents focus only on policies that still require action.
- **Issue Title:** (*Carriers, Distributors, Agents*) Fixed an issue in some instances where the Policy Action and participant indicators did not display as completed (green) on the Policy Dashboard after all signing steps were finished, particularly in Face-to-Face workflows. The dashboard now consistently reflects the correct completed status across both the main dashboard and policy detail views. This ensures agents and customers receive a clear, accurate visual confirmation that the policy signing process is fully complete.
- **Issue Title:** (*Carriers w/ CHARLi enabled*) Resolved an issue where consumers could unintentionally access the CHARLi chatbot by clicking inactive areas of the screen. CHARLi no longer triggers on inactive screen areas. This ensures a cleaner, more consistent consumer experience.
- **Issue Title:** (*Carriers, Distributors, Agents*) Resolved an issue where expired-policy processing caused intermittent timeout errors that could impact dashboard navigation. Performance improvements to the expiration logic now prevent these errors, ensuring

dashboards load reliably without interruption. Dashboard Users will experience a smoother, more stable dashboard experience, even as policies reach or pass their expiration dates.