07-21-026 DocFast 15.0.0 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.

DocFast: 15.0.0

Release Date: July 21, 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

Non-Signature Documents

Impacts / Availability: This new feature Requires Activation with your existing DocFast license and Configuration from your Professional Services Team.

Overview: Transform high-volume document delivery into a competitive advantage. With support for non-signature documents, carriers can dramatically reduce delivery costs by eliminating unnecessary signature-processing fees while securely sending millions of statements, notices, and policy communications. The solution leverages scalable cloud-based delivery to provide fast, reliable access for consumers and distribution partners without compromising security or auditability. Built-in authentication, access controls, and audit trails help meet compliance requirements while improving operational efficiency. The result is a more cost-effective, scalable, and modern way to engage policyholders at scale.

Benefit(s): Reduce operational costs by bypassing signature workflows for documents that do not require customer action. Scale digital communications to support millions of document deliveris without impacting performance or user experience. Ensure secure, compliant document access with builtin authentication, access controls, and audit tracking.

Contact: If you would like to learn more about this new feature, please contact your iPipeline Account Representative.

FIXES

- **Bulk Send Action Did Not Process Notifications for All Selected Policies**: *(Carriers, Distributors, Agents)* Fixed an issue when multiple policies were selected and submitted through the Send bulk action, notification processing could be limited to only a subset of the selected policies. As a result, intended recipients associated with all selected policies might not receive notifications. Additionally, the bulk send workflow included an email recipient confirmation step that could add unnecessary complexity when processing large numbers of policies.
  This issue has been resolved so that notifications are correctly processed for all policies included in a bulk send action, and the bulk send workflow has been streamlined by removing the email recipient confirmation screen.
- **Agent Decline Actions in AlphaTrust Did Not Update Policy Status Correctly**: *(Carriers using AlphaTrust for agent signature worklfows)* Fixed an issue when an agent chose to decline or cancel a signing request within AlphaTrust, the decline action was not consistently returned to DocFast. As a result, the policy could remain in an in-progress signature status instead of reflecting that the signing request had been declined. In some cases, users also encountered an error page during the decline process.

  This issue has been resolved so that agent and consumer decline actions are properly communicated back to DocFast, decline messages are recorded in Activity History, and policy statuses are updated to accurately reflect the declined signing outcome.
- **Agent Identity Consolidation Could Result in Duplicate Records and incomplete Profile Merges**: *(Carriers that use agent identity consolation across multiple distributor hierarchies)* Fixed an issue under certain circumstances, agent identity consolidation did not consistently evaluate all related distributor relationships when determining whether existing agent records should be merged. Depending on the order in which agent information was received from different sources, the system could create duplicate agent records or fail to fully merge agent attributes into a single consolidated profile.

As a result, some agent records could contain incomplete information, leading to issues with case assignment, visibility, and access to related work items. In some situations, administrative intervention was required to reconcile agent information and restore expected access.

This issue has been resolved to ensure agent consolidation consistently evaluates all applicable distributor relationships, correctly merges agent information regardless of processing order, and maintains complete agent profiles for accurate case routing and visibility.