

Step by step Electronic Contract Delivery

June 2020



Broker's information

How does the process start- EVO



**STREAMLINING
INSURANCE**

Contract delivery information will be published on Business Tracker and Advisors will receive notification by email and/or on a text message for each contract sold or modified

Client will have access to contract on My Client Space

Contract delivery process - EVO



Electronic Contract Delivery - Broker



Business Tracker - New Event

Hello,

Please note that a new event is available in your Business Tracker. To learn more, click on the *Business Tracker* tab in your Advisor Centre.

- An action is required
- Amendments / Health declaration - Pending/Information required
- Advisor: Sandra Insurer
- Client: JOHN SPECIMEN
- Request Follow-Up number: FN69H7NY9ZWFBYBL

Thank you and have a great day!

INVESTED IN YOU.



ia.ca

Notification sent to the advisor based on his/her notification preferences.

Subject:
Action required – Client name – Transaction type and status

Consult the Business Tracker to see and send the missing information

In Request Follow-Up

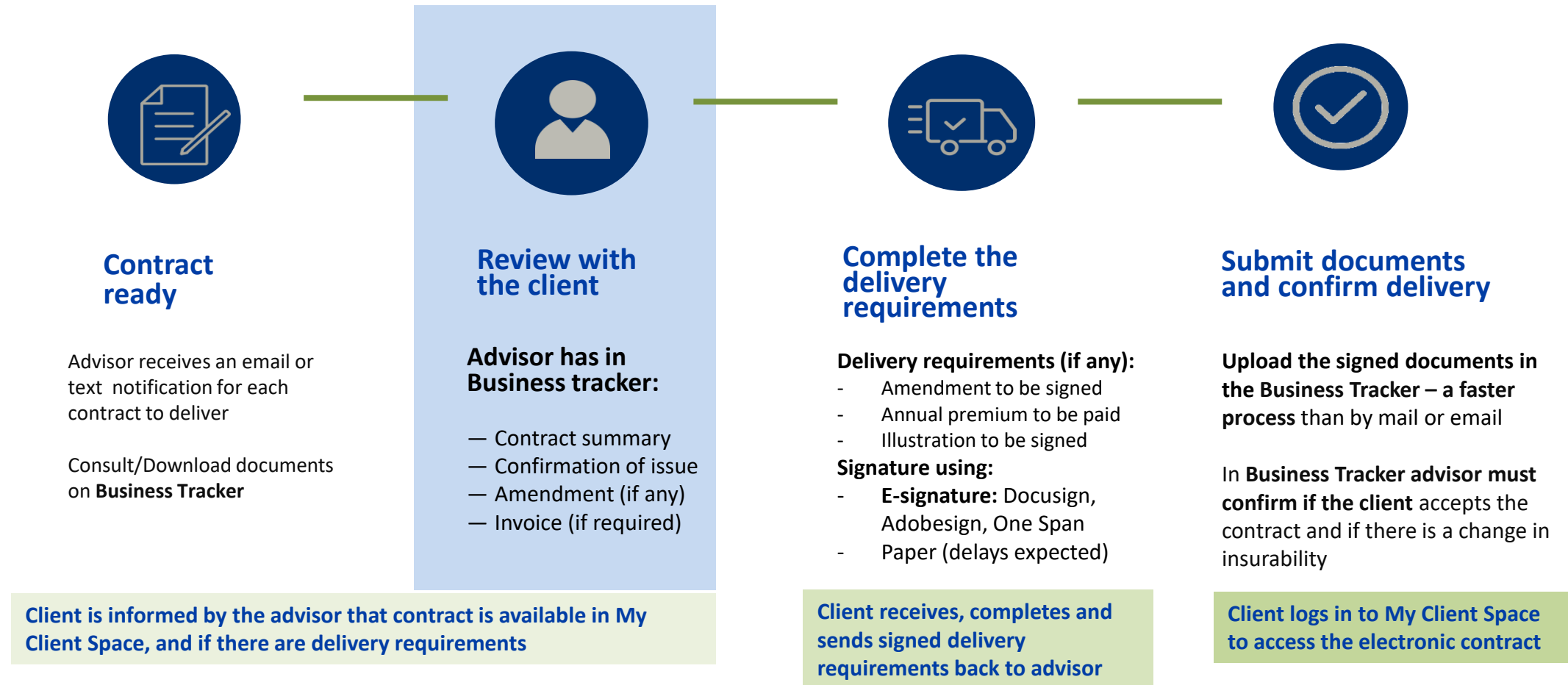
	+ Subject	Client	Advisor	!		Created ↓	Due	Progress	Action
<input type="checkbox"/>	- Contract delivery	John Specimen	Sandra Insurer			2020-06-03		In process	...
<div>Information required - Click on Request Follow-Up</div> <div> Action required: Contract delivery: 1. Contact your client to explain the contract and advise them that it is available on My Client Space.* 2. Validate with client if there has been any change in insurability status. 3. Please provide client with additional information, if needed. * There may be a slight delay between this message and the availability of the contract on My Client Space.</div>						2020-06-03	<ul style="list-style-type: none">• Request Follow-Up: FO15• Contract: 0060		

See the completed steps, from receipt to the processing of the transaction








Click on **Request Follow-Up** to :

- Consult the documents
- Know if there are delivery requirements and to transmit them
- Confirm that the client accepts the contract and if there is a change in insurability


Contract delivery process - EVO



In Request Follow-Up





Required		
Transaction - Insurance	Required on or after	Follow-up on
 Amendment or/and Insurability declarations - Client signature required - Please provide us with the signed amendment. Requested on 09-Jun-2020	09-Jun-2020	 Download  Upload
 Do you confirm that the contract has been accepted and delivered? Requested on 09-Jun-2020	09-Jun-2020	 Reply
 Illustration - Client signature required - Please provide us with a valid and signed illustration. Requested on 09-Jun-2020	09-Jun-2020	 Upload

Please send each information separately. This will save you additional processing time.

 Send additional information [Click here!](#)

The channel to use to send the signed the missing documents, such as a signed amendment.

Documents

Contract summary Contract summary for advisor use; the full contract is available on My Client Space. June 9, 2020	 Download
Confirmation of transaction or issue June 9, 2020	 Download
 Invoice - First premium Make sure invoice is received and paid by client for the coverage to come into force. June 9, 2020	 Download

Download give access to amendments documents:
Contract summary, confirmation of transaction or issue, amendement or invoice

Contract delivery process - EVO



Contract ready

Advisor receives an email or text notification for each contract to deliver

Consult/Download documents on **Business Tracker**

Client is informed by the advisor that contract is available in My Client Space, and if there are delivery requirements



Review with the client

Advisor has in Business tracker:

- Contract summary
- Confirmation of issue
- Amendment (if any)
- Invoice (if required)



Complete the delivery requirements

Delivery requirements (if any):

- Amendment to be signed
- Annual premium to be paid
- Illustration to be signed

Signature using:

- **E-signature:** Docusign, AdobeSign, One Span
- Paper (delays expected)

Client receives, completes and sends signed delivery requirements back to advisor



Submit documents and confirm delivery

Upload the signed documents in the **Business Tracker** – a faster process than by mail or email

In **Business Tracker** advisor must **confirm** if the client accepts the contract and if there is a change in insurability

Client logs in to My Client Space to access the electronic contract

Sign the documents with your client!

Requirement Management – Amendment

Your references for the signature of your clients!

➤ Preferred solution:

➤ Signature with OneSpan

- References of training tools available for you :
- *Remote selling* tile available in iA Campus
- “How to” clips on the Covid advisor site
 - Click on the following link : <https://covid-advisor.ia.ca/useful-links> *Making secure electronic signatures (authorized tools) section*
 - **Specific material for the signature of amendments will be available shortly.**

**Check out the
clips now!**

➤ Other accepted solutions:

- Click on the following link: <https://covid-advisor.ia.ca/contracts-with-amendment>

In Request Follow-Up

Amendment or/and Insurability declarations - Client signature required

ONLINE

BY MAIL

Max file size : **25 MB**
Authorized file type : **tif, tiff, doc, docx, xls, xlsx, pdf, jpeg, jpg, png, gif**

Please send each information separately. This will save you additional processing time.

Browse

Attach the document

Send

Close

Contract delivery process - EVO



Contract ready

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Submit documents and confirm delivery

Upload the signed documents in the **Business Tracker** – a faster process than by mail or email

In **Business Tracker** advisor must confirm if the client accepts the contract and if there is a change in insurability

Client logs in to My Client Space to access the electronic contract

In Request Follow-Up

We have a question for you

Important!
Your answer can no longer be changed after clicking on *Confirm* button.

Do you confirm that the contract has been accepted and delivered?

☐ Yes, without any change in the insured's health status, lifestyle or financial situation.

☐ Yes, with changes in the insured's health status, lifestyle or financial situation (please provide a signed F3A form).

☐ No, the applicant does not accept this contract.

Attach a document

Add a document Max file size : **25 MB**
Authorized file type : **tif, tiff, doc, docx, xls, xlsx, pdf, jpeg, jpg, png, gif**

Attach an additional document, if requested

Confirm **Cancel**


Confirm here that the client accepts the contract and if there is a change in insurability (when needed)

In Request Follow-up

Required

Required section

Automatically updated – Based on the information sent and the information still required (as needed)



No information to provide for now. We will contact you as needed!



Send additional information [Click here!](#)

Documents

Contract summary

Contract summary for advisor use; the full contract is available on My Client Space.

June 9, 2020



Download

Confirmation of transaction or issue

June 9, 2020



Invoice – First premium

Make sure invoice is received and paid by client for the coverage to come into force.

June 9, 2020

For in-force policies, this document will simply be called “Invoice”

In Request Follow-up

Provided section

As soon as the information is sent –
Automatically updated

Required

Provided


	Required on or after	Follow-up on	Sent on
✓ Amendment or/and Insurability declarations - Client signature required - Please provide us with the signed amendment. Requested on 09-Jun-2020 View the provided information	09-Jun-2020		09-Jun-2020
✓ Do you confirm that the contract has been accepted and delivered? Requested on 09-Jun-2020 View the provided information	09-Jun-2020		09-Jun-2020
✓ Illustration – Client signature required - Please provide us with a valid and signed illustration. Requested on 09-Jun-2020 View the provided information	09-Jun-2020		09-Jun-2020

Information sent by the client or through another channel than Request Follow-Up cannot be accessed.



Send additional information [Click here!](#)

In the Business Tracker


<input type="checkbox"/>	+ Subject	Client	 Advisor	!		Created ↓	Due	Progress	Actions
<input type="checkbox"/>	— Contract delivery	John Specimen	Sandra Insurer			2020-06-09		Completed	...
<div>Request completed</div>						2020-06-09	<ul style="list-style-type: none">Request Follow-Up: FO7QContract: 005		
Prior communications Information required - Click on Request Follow-Up						2020-06-09			
<div><div></div>Action required: Contract delivery:<ol style="list-style-type: none">Contact your client to explain the contract and advise them that it is available on My Client Space.*Validate with client if there has been any change in insurability status, if needed.Please provide client with additional information, if needed.<i>* There may be a slight delay between this message and the availability of the contract on My Client Space.</i></div>									


Updated automatically –
When all the required
information is transmitted

A good tip !

To show the transactions that require transmitting additional information

Importance


☐ Action required 

☐ Action suggested 

☐ Informative

Archive status

☒ Active

☐ Archived 

Assigned to

☐ Me

☐ Another person

☐ Not assigned

Sector

☐ Insurance - Transactions

☒ Underwriting - New business

☐ Transactions

☐ Client documents - Contract events

☐ Claims - Insurance

☐ Savings and retirement

Progress

☒ In process



☐ Pending

☐ Completed

☐ Cancelled


☐ No status


Advisors

 Select an advisor 
Selected advisors: None

☐ Vacant only

Other filters

☐ Insurance : Pending - Reminder sent 

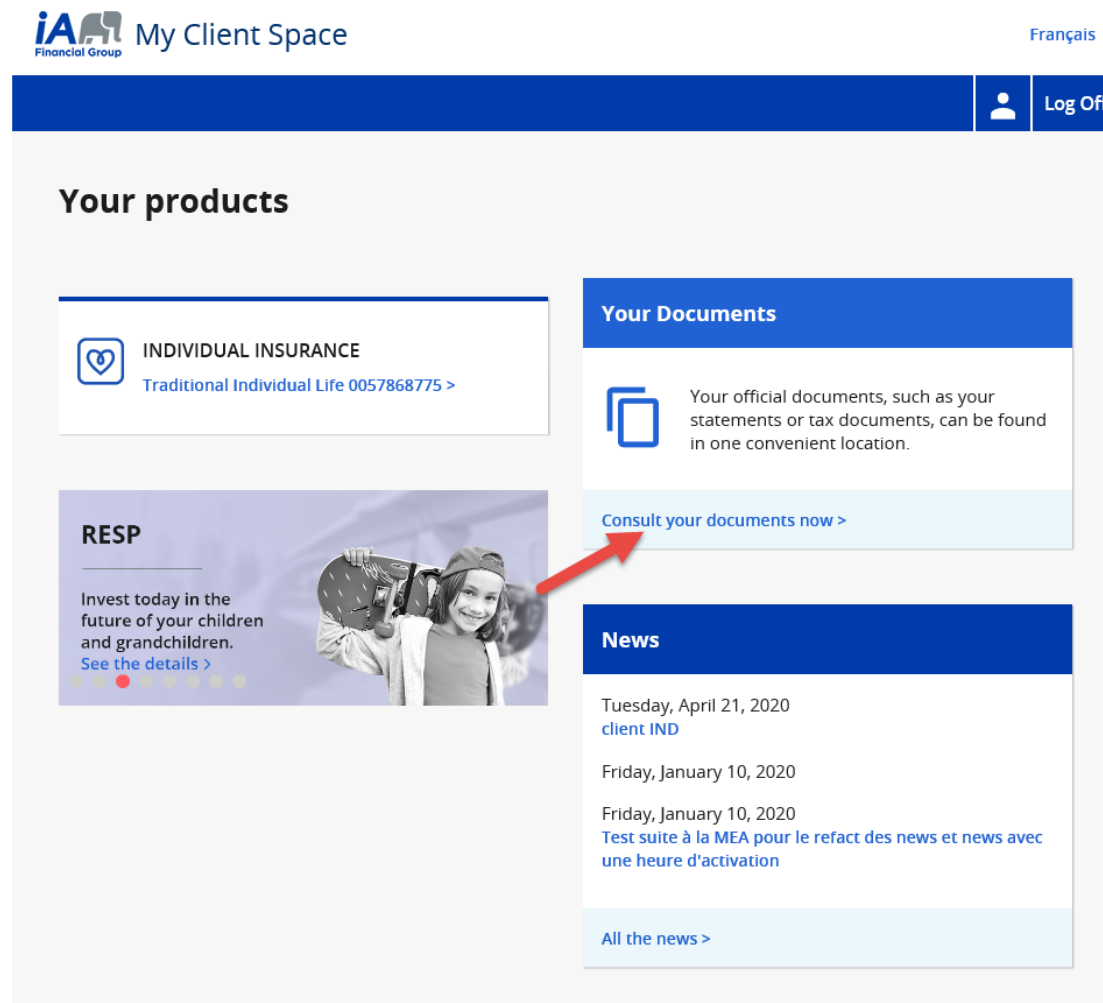
☐ Claims - Insurance : Not handled by advisor 

Due	Progress
	In process
	In process
	In process
	In process
	In process

Business Tracker
Option to choose the *Filtres*

Client's information

In My Client Space



iA Financial Group My Client Space Français

Your products

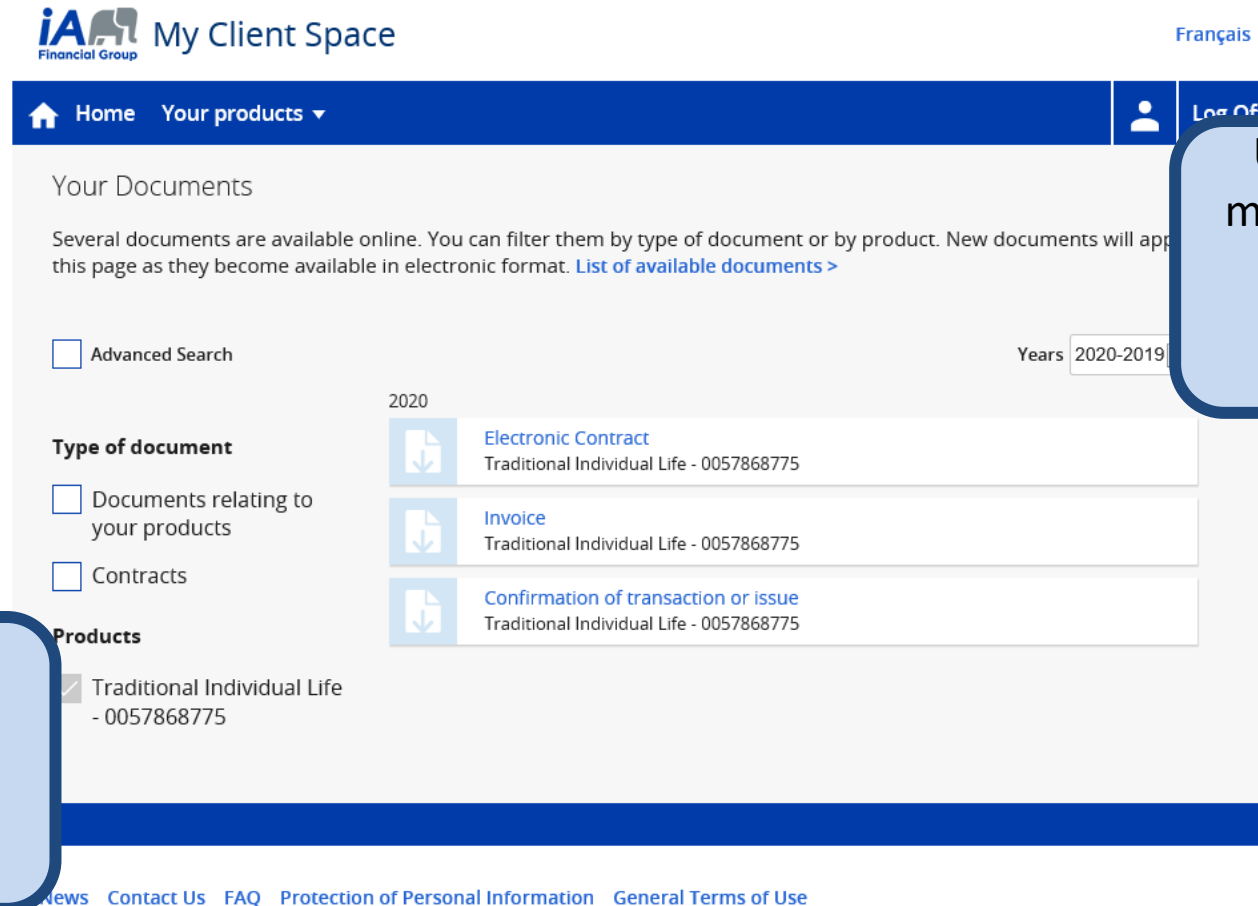
INDIVIDUAL INSURANCE
Traditional Individual Life 0057868775 >

RESP
Invest today in the future of your children and grandchildren.
See the details >

Your Documents
Your official documents, such as your statements or tax documents, can be found in one convenient location.
Consult your documents now >

News
Tuesday, April 21, 2020
client IND
Friday, January 10, 2020
Friday, January 10, 2020
Test suite à la MEA pour le refact des news et news avec une heure d'activation
All the news >

In My Client Space



The screenshot displays the 'My Client Space' interface. At the top, there is a navigation bar with 'Home' and 'Your products' links, a user profile icon, and a 'Log Off' button. The main content area is titled 'Your Documents' and includes a brief explanation of document availability and a link to 'List of available documents >'. Below this, there are filter options: 'Advanced Search' (unchecked), 'Type of document' (with checkboxes for 'Documents relating to your products' and 'Contracts'), and 'Products' (with a checked checkbox for 'Traditional Individual Life - 0057868775'). A table of documents is shown, filtered for the year 2020, listing 'Electronic Contract', 'Invoice', and 'Confirmation of transaction or issue', all for 'Traditional Individual Life - 0057868775'. The footer contains links for 'News', 'Contact Us', 'FAQ', 'Protection of Personal Information', and 'General Terms of Use'.

Using Extranet 2.0, you may see the same view as the user in “Your documents” to assist him/her.

If a client has many products, he/she will be able to filter documents using the tickboxes

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