Step by step
Electronic Contract Delivery

June 2020

iA Financial Group

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Broker’s information

How does the process start- EVO

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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

Contract ready

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

Consult/Download documents on **Business Tracker**

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)

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 (when needed)

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

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

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

Electronic Contract Delivery - Broker

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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!

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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

Electronic Contract Delivery - Broker

In Request Follow-Up

	+ Subject	Client	Advisor	!		Created	Due	Progress	Action
	– Contract delivery	John Specimen	Sandra Insurer			2020-06-03		In process	•••

Information required - Click on Request Follow-Up

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.*

2020-06-03

- 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

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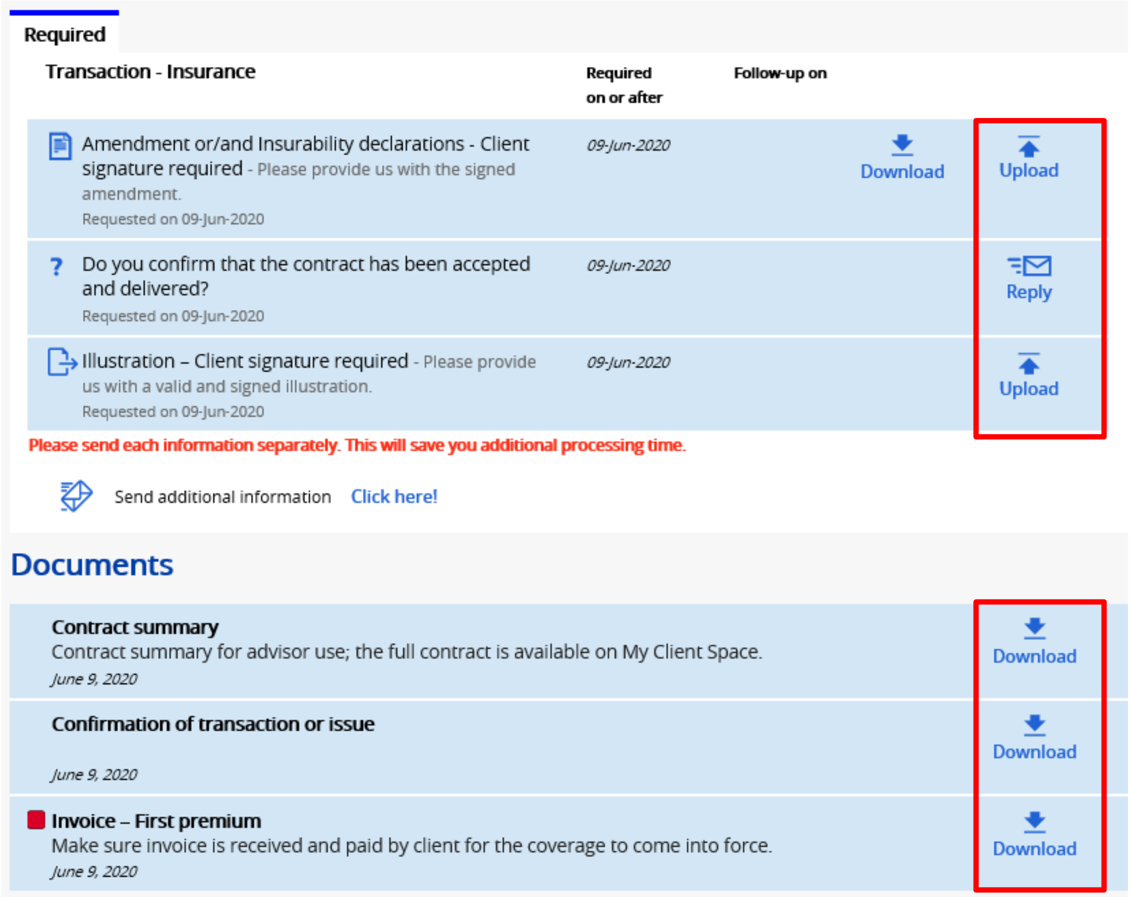
Electronic Contract Delivery - Broker

In Request Follow-Up



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

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

Contract delivery process - EVO

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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!

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Check out the clips now!

- **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.**
  - **Other accepted solutions:**
    - Click on the following link: https://covid-advisor.ia.ca/contracts-with-amendment

Electronic Contract Delivery - Broker

In Request Follow-Up

Contract delivery process - EVO

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Electronic Contract Delivery - Broker

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**

Confirm   Cancel

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

Attach an additional document, if requested

In Request Follow-up

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

Required

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"

Electronic Contract Delivery - Broker

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!

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In the Business Tracker

	+ Subject	Client	Advisor	!		Created	Due	Progress	Actions
	– Contract delivery	John Specimen	Sandra Insurer			2020-06-09		Completed	•••

Request completed — 2020-06-09

- Request Follow-Up: FO7Q
- Contract: 005

Prior communications

Information required - Click on Request Follow-Up — 2020-06-09

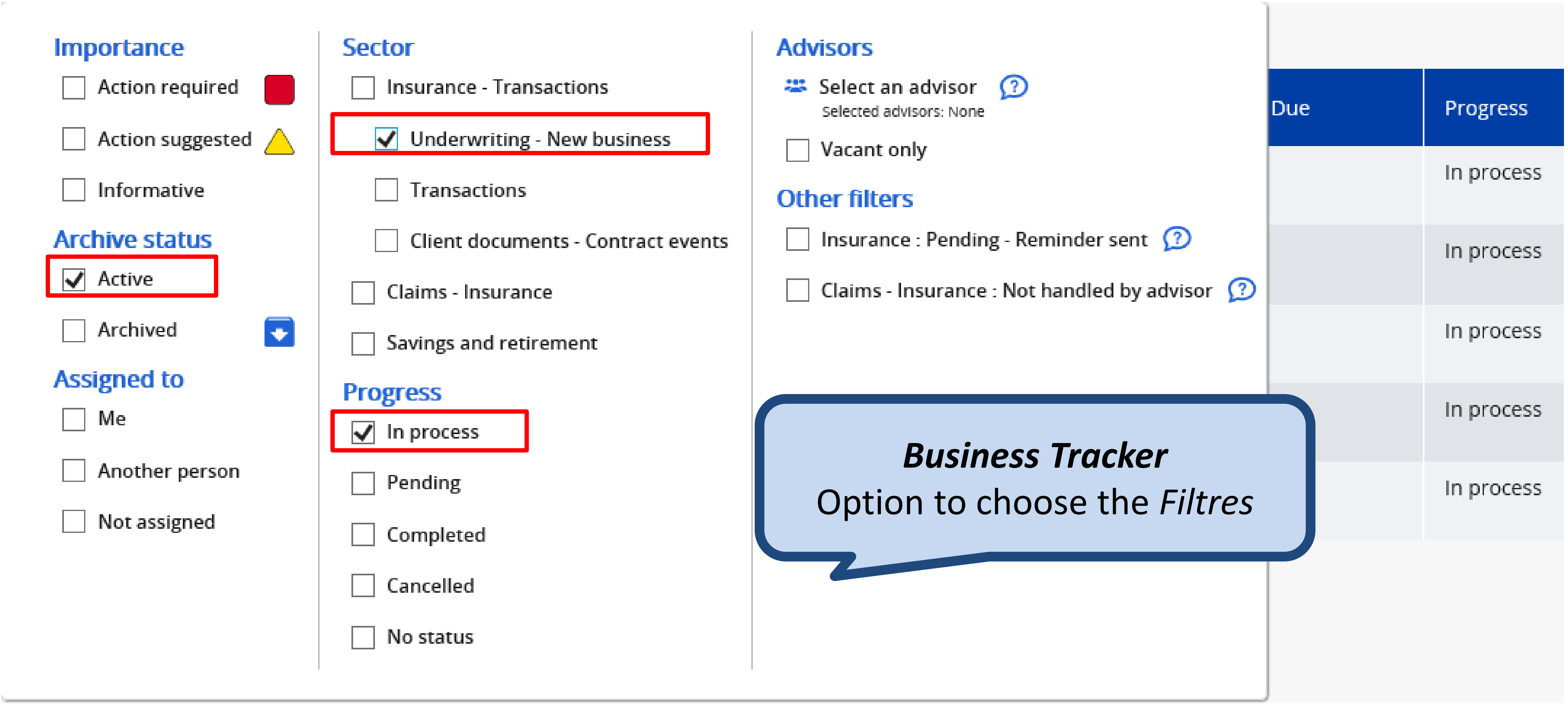
Action required: Contract delivery:
1. Contact your client to explain the contract and advise them that it is available on My Client Space.*
2. Validate with client if there has been any change in insurability status, if needed.
3. Please provide client with additional information, if needed.

** There may be a slight delay between this message and the availability of the contract on My Client Space.*

Updated automatically – When all the required information is transmitted

A good tip !

To show the transactions that require transmitting additional information

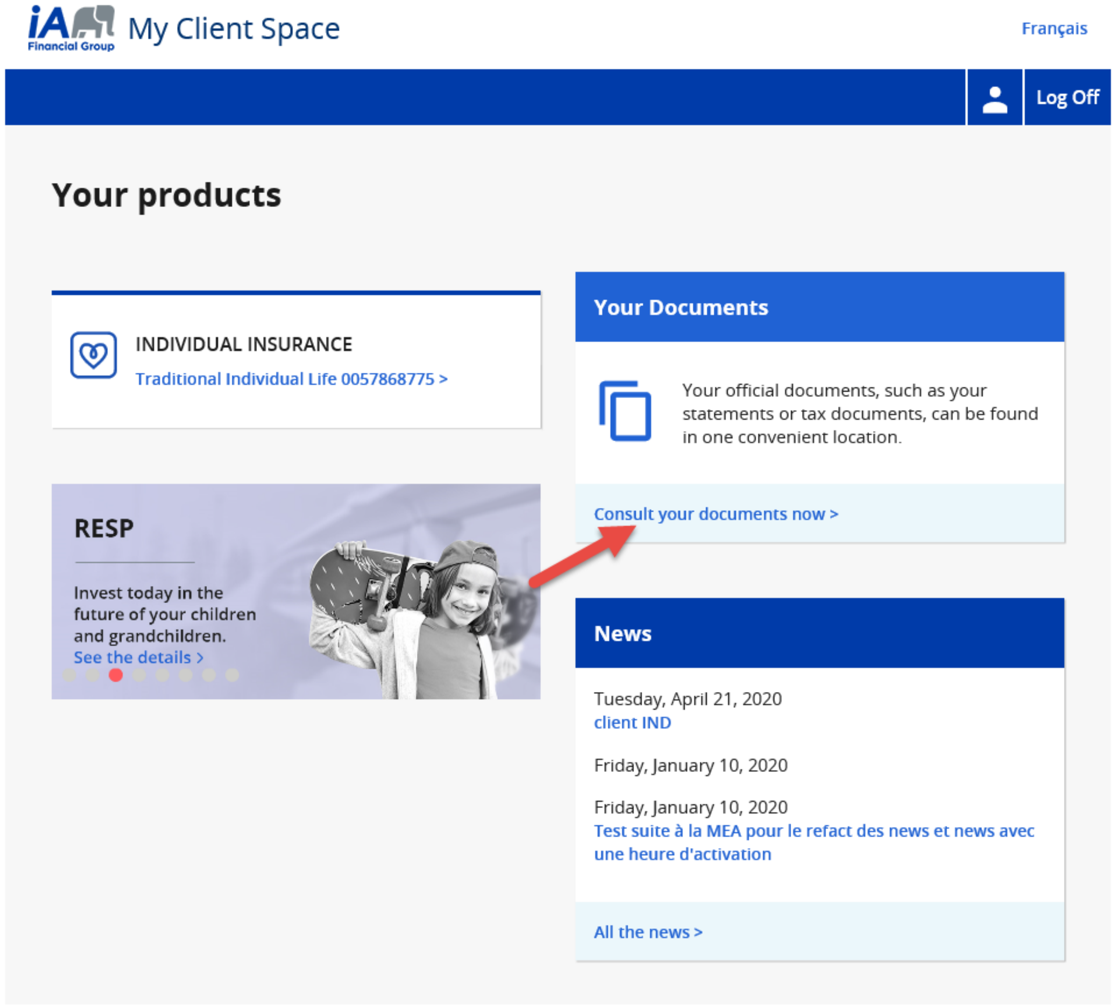


Business Tracker
Option to choose the *Filtres*

Client’s information

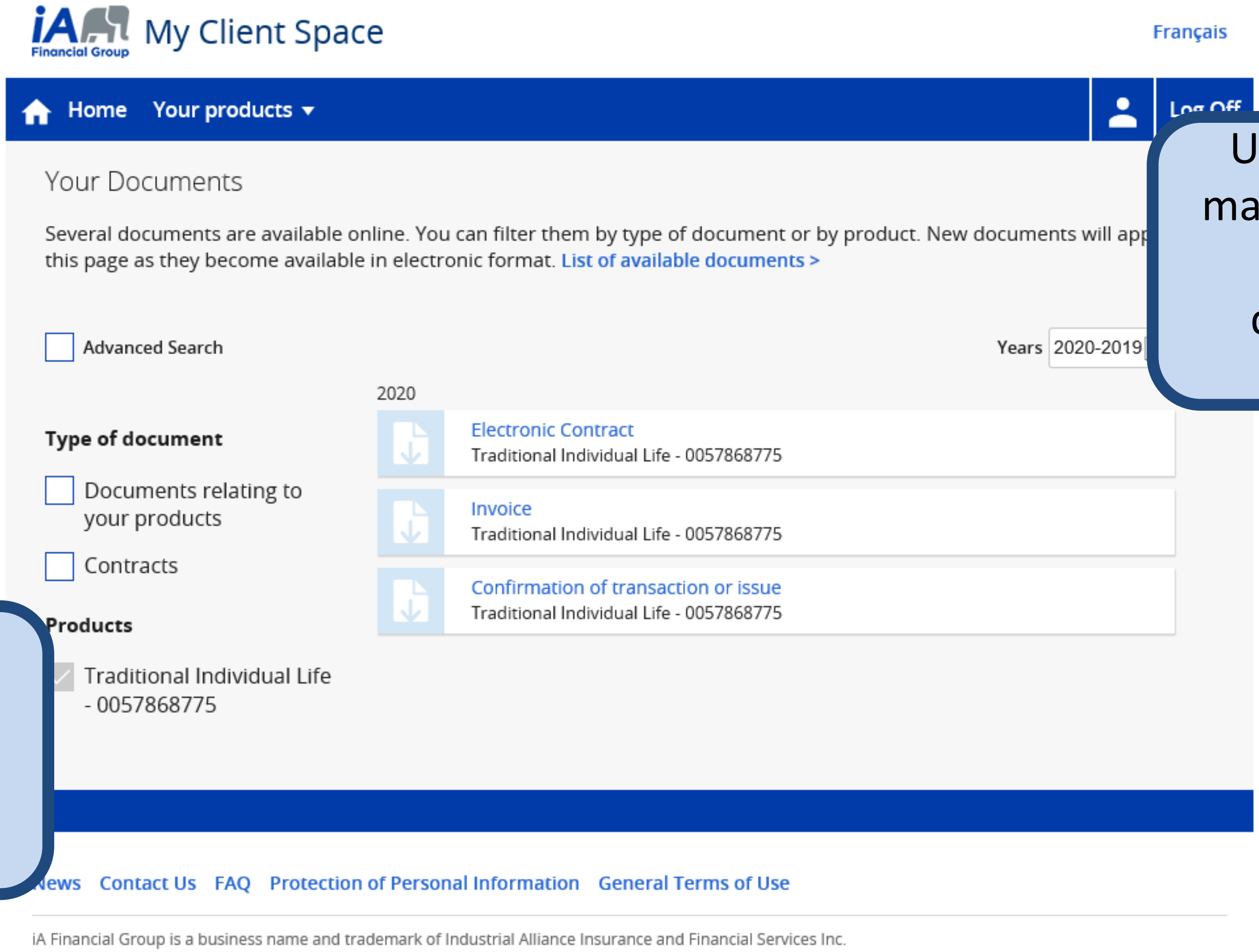
Electronic Contract Delivery - Client

In My Client Space



Electronic Contract Delivery - Client

In My Client Space



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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