

CONTRACTS DELIVERY

Delivery of Contracts submitted through EVO

Looking for the [Assure&Go process](#)?

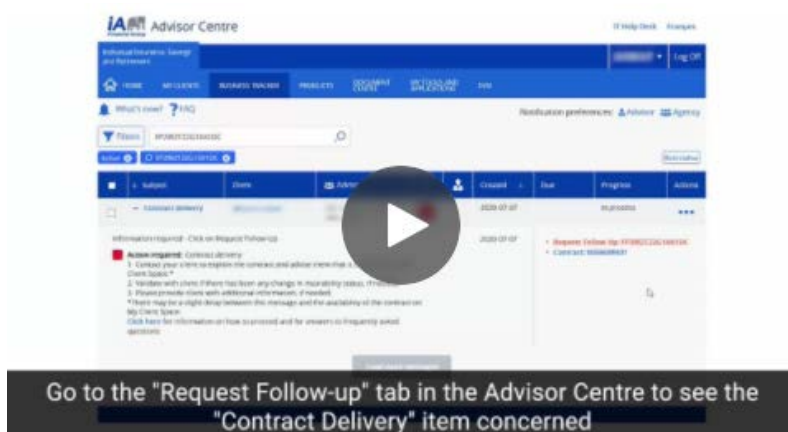
How-To | Delivery of contracts submitted through EVO

[Step-by-Step Guide: Delivery of contracts submitted through EVO](#)

[Step-by-Step Guide: Delivery of contracts Career Network](#)

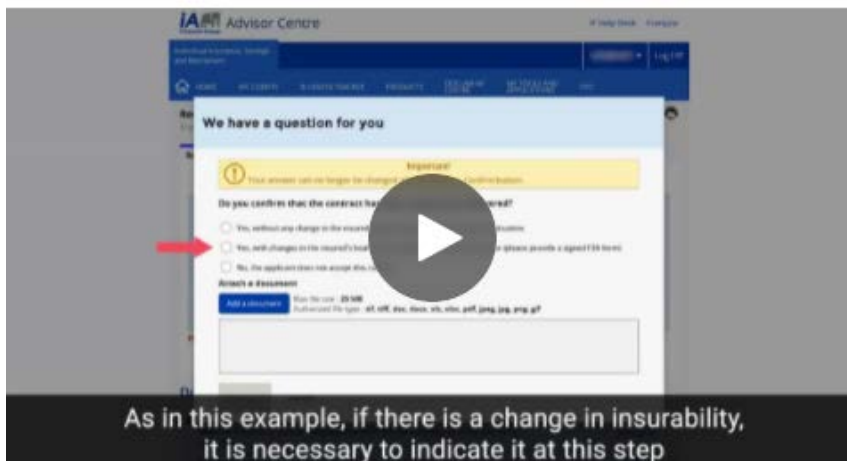
How-To | Delivery of contracts with no delivery requirements

1. The advisor will be notified, by email or text message, of a contract to deliver.
2. Documents can be downloaded via the initial request in the Business Tracker:
 - The contract summary includes the specifications and clauses but excludes the declaration of insurability
 - Confirmation of transaction
3. Clients have access to their contract and confirmation in the Document section in My Client Space.
 - The contract includes a cover page, specifications, clauses, application, declaration of insurability and amendments.
 - **How-To | Access to My Client Space**
4. Review the content of the contract with your clients.
5. Confirm that the clients accept the contract and verify changes in insurability, if any.
6. The contract is delivered.



How-To | Delivery of contracts with delivery requirements

1. The advisor will be notified, by email or text message, of a contract to deliver.
2. Documents can be downloaded via the initial request in the Business Tracker:
 - The contract summary includes the specifications and clauses but excludes the declaration of insurability
 - Confirmation of transaction
3. Identify the necessary delivery requirements:
 - Amendment to sign, if any: **How-To | Signature of contract amendments submitted through EVO**
 - Annual premium payments: **How-To | Payment**
 - New illustration to be signed: **How-To | New illustration required**
4. Clients have access to their contract, confirmation, amendment and premium notice under *Documents* in My Client Space.
 - *The contract includes a cover page, specifications, clauses, application, declaration of insurability and amendments.*
 - **How-To | Access My Client Space**
5. Review the contract content and amendments with your clients, answer questions, confirm that the clients accept the contract and complete the delivery requirements.
6. Please forward the signed amendment to us via the Business Tracker
7. Confirm that the clients accept their contract and verify changes in insurability, if any.
8. The contract is delivered.



How to proceed | Signature of amendments in contracts submitted by EVO

Electronic Signature	Paper Signature
<ol style="list-style-type: none"> 1. Download the documents to be signed from the event published in the Business Tracker 2. Review the content of the amendment with your client and answer questions 3. Have your client sign the document in accordance with the requirements of the E-Signature best practices guide 4. Re-transmit the amendment signed by Business Tracker 	<ol style="list-style-type: none"> 1. Download and print the documents to be signed from the event published in the Business Tracker 2. Review the content of the amendment with your client and answer questions 3. Send the document to your client with a clear indication of where he or she should sign 4. Once signed, we retransmit the amendment signed by the Business Tracker

How to proceed | New illustration required

- Create a new illustration on [EVO](#)
- Send it to your client to sign using one of the two options provided below.

We encourage you to use the electronic signature process that allows fast processing times and avoids postal delays.

Electronic Signature	Signature papier
<ol style="list-style-type: none"> 1. Create a pdf file of the Illustration 2. Send the PDF file to your client by email 3. Review the content of the illustration with your client 4. Have your client sign the document in accordance with the requirements of the E-Signature best practices guide 5. Re-transmit the illustration signed by Business Tracker 	<ol style="list-style-type: none"> 1. Print the new illustration and send the document to your client with a clear indication of where he or she should sign 2. Review the content of the illustration with your client 3. Once signed, we retransmit the illustration signed by the Business Tracker

How to proceed | Payment

Payment options are specified in the document.

- Transmit the [document securely](#) to your client for payment by the method of their choice.
- Your client may use the online payment option of their financial institution. The reference number is composed of the letters VI followed by the contract number, (e.g., VIXXXXXXXXXX). It is important that you provide your client with these instructions as well as their contract number.

FAQ

How to "Print to PDF"

[Watch video tutorial](#)

Why has the insurability question been dropped for contracts issued prior to June 15th?

Since the question on insurability has already been covered in the signed amendment and confirmation letter, there is no need to repeat it.

Why isn't there any *Confirmation of transaction or issue* for contracts issued prior to June 15th?

- The confirmation is only provided for new issues. For contracts issued between March 17th and June 15th, which are considered as part of the backlog, the confirmation is obsolete.
- The up-to-date information may be obtained from the "Premium" section in My Client Space/Advisor Space.

What happens if a contract has been in force for a certain time and the client has paid the premium but refused the contract upon delivery?

For all contracts issued between March 17th and June 15th, which have delivery delays, iA will extend the free-look period until August 15th.

For contracts issued as from June 15th, the 10-day free-look period starts from the date the advisor confirms acceptance of the contract in the Business Tracker.

Will there be chargebacks regarding the non-delivered contracts?

There won't be compensation charges related to contract delivery.

However, delivery requirements (amendments to be signed, premium to be paid) must be provided to bring the contract into force, and therefor pay or retrieve the compensation. Otherwise, the contract will be considered pending and there could be chargeback on the policy if compensation has already been paid.

Why can't I have a complete copy of the contract?

Canadian Laws do not allow you to keep the confidential information of a client, such as medical declarations. This is why you have a Contract Summary, excluding the declaration of insurability.

Is the contract deleted or archived after some time?

- The client copy of the contract in My Client Space will always be available.
- The Contract Summary for advisor use on the Business Tracker will be deleted after two years. You may save a copy of the Contract Summary in your files.

I would like to have a contract corrected or modified. How do I proceed?

- You should confirm that the client accepts the contract and then use the function "send additional information" to submit the change.

What will happen next?

- As is the case with the old paper process, a *Change at issue* request will be created and will appear in the Business Tracker.
- Once the correction is made, a new *Contract Delivery* task will appear in the Business Tracker reflecting the corrected contract. The former *Contract Delivery* task will be deleted.

How can I review the information that was previously transmitted through the Business Tracker?

- The information that was previously transmitted through the Business Tracker may be reviewed any time by clicking on *Request Follow-up* under the *Initial Request*. Click on *Provided the View the provided information*.

HOME MY CLIENTS BUSINESS TRACKER PRODUCTS DOCUMENT CENTRE MY TOOLS AND APPLICATIONS EVO

Request Follow-Up - SAA [Need help?](#)

Tracking number :

Required **Provided**

	Required on or after	Follow-up on	Sent on
Amendment or/and Insurability declarations - Client signature required - Click here for information on how to proceed and for answers to frequently asked questions. Requested on 12-May-2020	12-May-2020		21-May-2020

[View the provided information](#)

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

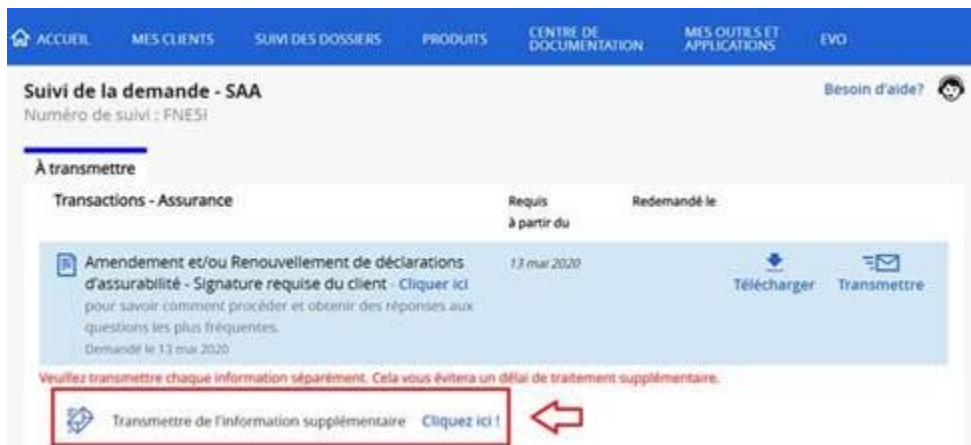
[Send additional information](#) [Click here!](#)

Additional section that is available in the French version but not here.

Can I demand to change the payment method via the Business Tracker after the contract has been delivered?

As is the case with sending paper documents, you can also ask to change the payment method via the Business Tracker.

- Prepare your request to change the payment method on EVO Electronic changes.
- Have your client sign by following the guidelines presented in the [Guide to Best Practice – Electronic Signature](#).
- Send the duly signed request to change the payment method by clicking on *Send additional information*.



Does the advisor have to indicate a change in insurability, and how should the advisor inform iA of such a change?

The advisor must validate any change in the insurability of the insured. In such a case, the advisor must complete an F3 form (declaration of insurability), have it signed by the client and return to the Underwriting Department.

For assistance

IT service desk for technical support

By phone :1 888 610-5101

By email: interface@ia.ca

Client and partner contact center *for all other questions*

By phone :1 844 4iA-INFO

By email: infovie@ia.ca

Delivery of contracts submitted through Assure&Go

How-To | Delivery of contracts submitted through Assure&Go

The contract is sent by regular mail to the client.

How-To | Consult the contracts on Assure&go

- Log into Assure&go
- Visit the "My business" tab
- Click on "Reports" on the left side of the screen
- Enter the contract (certificate) number in the search bar

How to proceed | Open the secure PDF file

The PDF file will open with the following password that will be sent to you in a second email:

- The first letter of the client's last name in uppercase
- The first letter of the client's first name in lower case
- The client's postal code in lower case

How to proceed | Signing of amendments in contracts submitted by Assure&Go

We encourage you to choose the electronic signature option that will allow for faster processing and avoid postal delays.

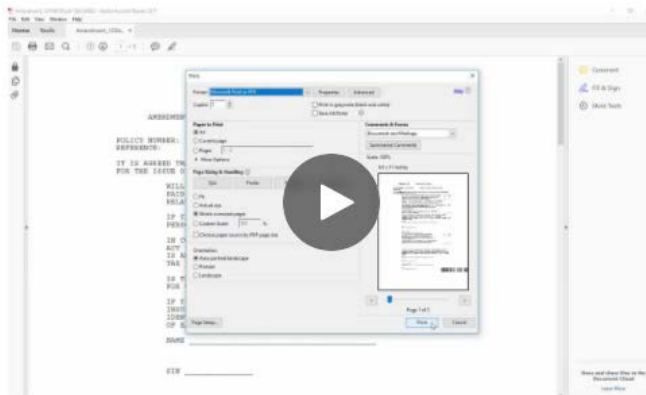
Electronic Signature	Paper Signature
<ol style="list-style-type: none">1. Open the secure PDF file2. Revise the content and answer questions, if applicable3. Use the "Print to PDF" option to create a new PDF file for your client4. Have your client sign the document in accordance with the requirements of the E-Signature best practices guide5. Return the signed PDF by email at: IAM-newbusiness@ia.ca	<ol style="list-style-type: none">1. Open the secure PDF file2. Revise the content and answer questions, if applicable3. Print the document and sign it4. Mail the signed document to the client, indicating where he/she should sign5. Mail the signed document to iA Financial Group: 1611, boul. Crémazie Est, bureau 900 Montréal (Québec) H2M 2P2

How to proceed | Payment

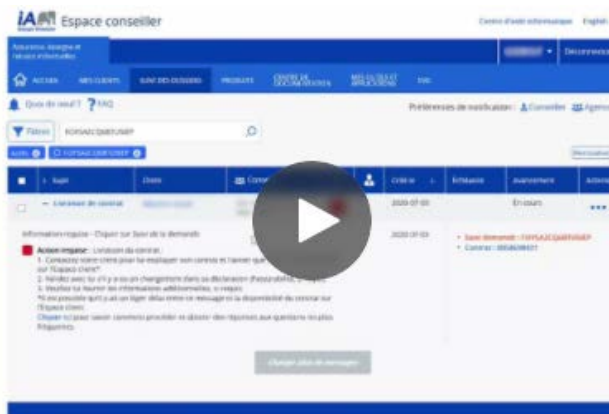
Payments options are specified in the document.

- Use the following password to open the PDF file:
 - The first letter of the client's last name in uppercase
 - The first letter of the client's first name in lower case
 - The client's postal code in lower case
- Transmit the [document securely](#) to your client for payment by the method of their choice.

How to "Print to PDF"



Contract between Marc and June



For assistance

By phone: 1 800 465-5818

By courriel: livingbenefits@ia.ca