



INVESTED IN YOU.

Requirement Management – Amendment



Before March 17th - Communication process



 Agent received amendments with the paper version of the contracts, validate the information and has the client sign the amendments.

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Requirement Management – Amendment



New communication process



- Advisor informed by the Business Tracker of the missing information still needed to process the insurance transaction.
- Notification sent to the advisor based on their notification preferences. This
 notification replaces the email to the agency.

	iAM											
	Business Tracker - New Event											
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				Información required - Click on Request Follow-Op 2500 65 65 Action required: Place provide the required información						Request Follow Up: PN79/09/05/EPC00085. Contract 0046.		
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New Communication Process



Efficiency

- No more manual email forwarding
- No more forms lookup in the document center
- Facilitated processing and shortened processing delay

Complete overview in Business Tracker

- Easy status filtering (Ex.: In process, Pending, Completed, etc.)
- See the "Required" and "Provided" information at a glance



Secure way to transmit information





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Requirement Management – Amendment





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

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Requirement Management – Amendment



In Business Tracker

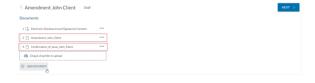


IAM Requirement Management – Amendment In Request-Follow-Up THE channel to use to send Request Follow-Up - SAA the missing information Download give access to amendments documents Sign the documents with your client! Requirement Management – Amendment iAA Your references for the signature of your clients! > 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-advisoria.ca/useful-links Making secure electronic signatures (authorized tools) section Specific material for the signature of amendments will be available shortly. \triangleright Other accepted solutions: • Click on the following link: https://covid-advisor.ia.ca/contracts-withamendment

Requirement management – Amendment Electronic signature process with your client!



> Add the amendments and the confirmation of issue to the transaction in OneSpan



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Requirement management – Amendment Electronic signature process with your client!



> Add a signature field



Requirement management – Amendment Electronic signature process with your client!



Add responses to the amendment question (if applicable)



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Requirement management – Amendment Electronic signature process with your client!



> Add responses to the amendment question (if applicable)



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Requirement management – Amendment Electronic signature process with your client!



Add a text box for the details of the answer (if applicable)



Requirement management – Amendment Electronic signature process with your client!



> Answer the question (if applicable)



Requirement management – Amendment Electronic signature process with your client!



> Add response details (if applicable)



Requirement management – Amendment Electronic signature process with your client!



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OneSpan Sign Mobile Ceremony

accesses signification

Example 1

- > The client receives the amendment with the answers provided by the advisor.
- > The client signs th amendment



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IAA Requirement Management – Amendment In Request Follow-Up Amendment or/and Insurability declarations - Client signature required ONLINE BY MAIL Max file size : 25 MB Authorited file type : tif, tiff, doc, docx, xls, xlsx, pdf, jpeg, jpg, png, gif Attach the document 19 iAA Requirement Management – Amendment In Request Follow-Up Provided section As soon as the information is sent – Automatically updated Request Follow-Up - SAA 20 iAA Requirement Management – Amendment In Request Follow-Up iAM **Required section**Automatically updated – Based on the information sent and the information still required (as needed)

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Send additional information Click here!

Requirement Management – Amendment



In Business Tracker



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Tip!



Display the transactions requiring the sending of missing information



