

Case Sharing Procedure

When collaborating, a user can share a case file with another user who has access to EVO Insurance.

Sharing a case file with another user

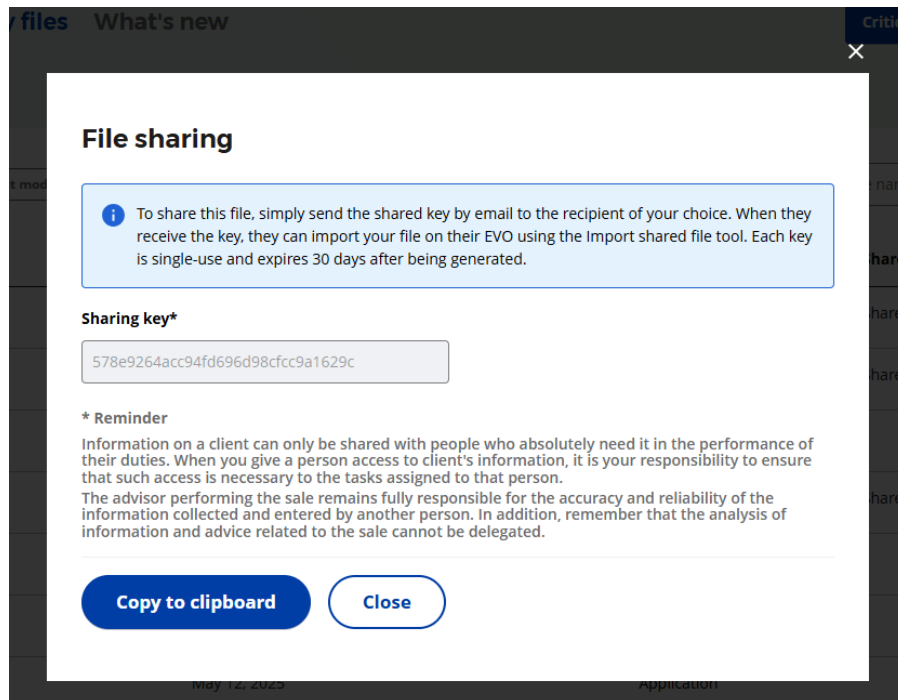
1. Go to **My files** section in EVO Insurance.

Create an illustration **My files** What's new

2. Identify the client file you want to share and click the Share this file icon (arrow symbol).

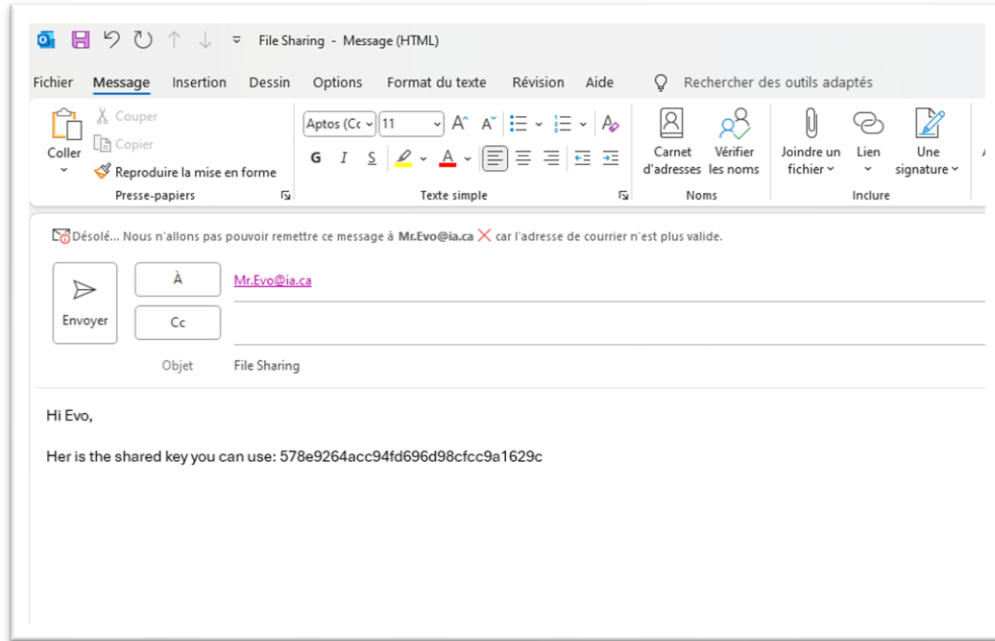


3. In the new window, click the **Copy to clipboard** button to copy the sharing key.



4. Paste the sharing key into an email and send it to the intended recipient (who must have the appropriate access rights to work on the client's file).

Each sharing key has a unique use and expires after 30 days.

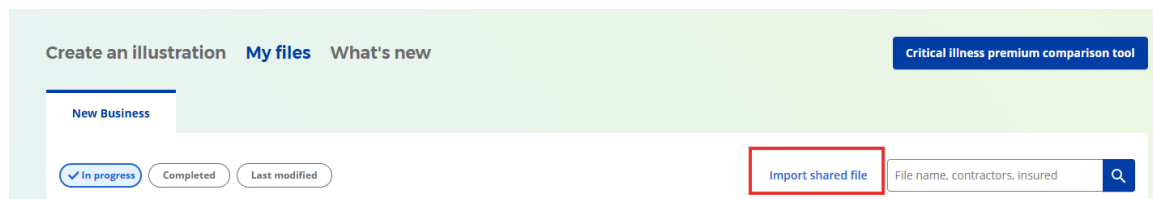


Receiving a sharing key by email

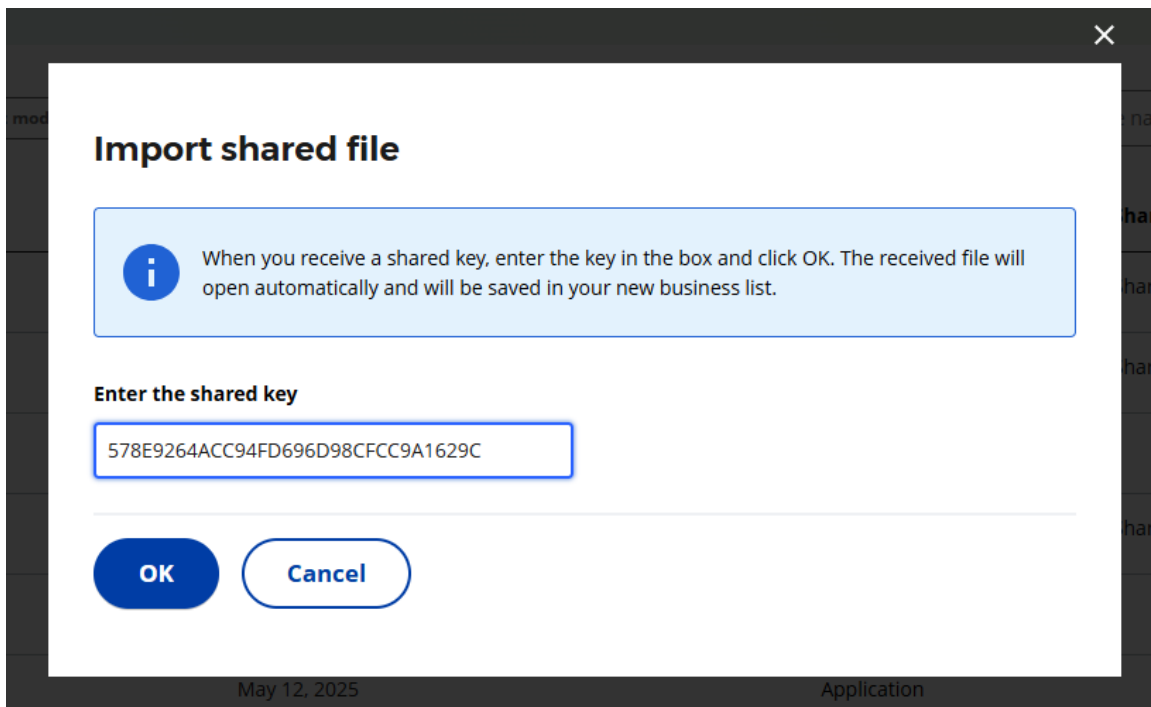
1. Go to **My files** section in EVO Insurance.

Create an illustration **My files** What's new

2. Click on **Import shares file**.



3. Paste the sharing key received by email into the new window.



Import shared file

When you receive a shared key, enter the key in the box and click OK. The received file will open automatically and will be saved in your new business list.

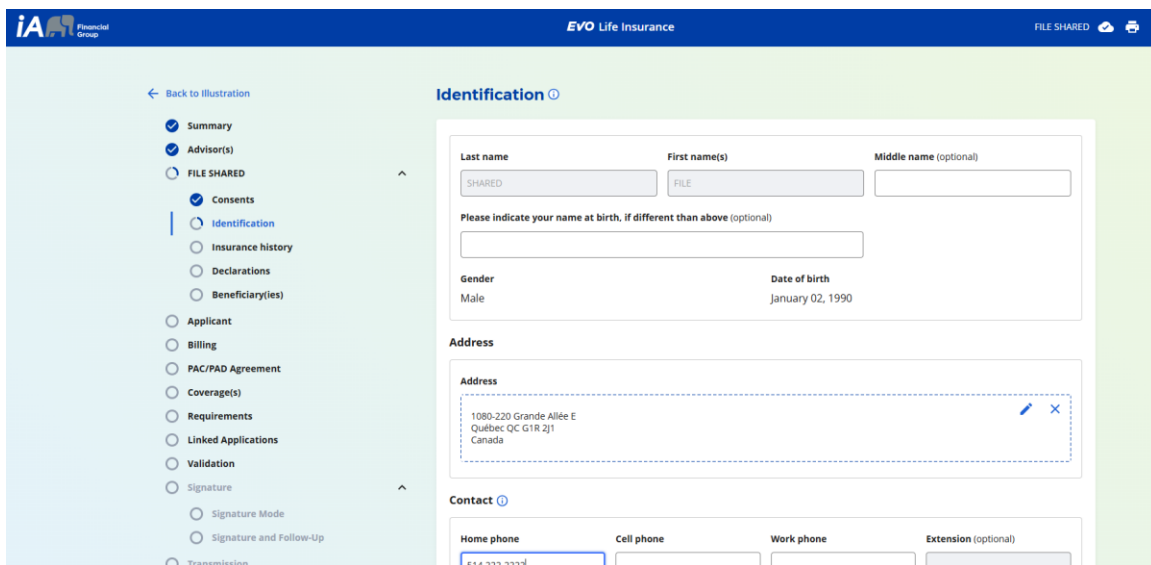
Enter the shared key

578E9264ACC94FD696D98CFCC9A1629C

OK **Cancel**

May 12, 2025 Application

4. After clicking **OK**, the client file will appear on your screen.



iA Financial Group **EVO Life Insurance** FILE SHARED

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Identification

☒ Summary
☒ Advisor(s)
☐ FILE SHARED
☒ Consents
☒ **Identification**
☐ Insurance history
☐ Declarations
☐ Beneficiary(ies)
☐ Applicant
☐ Billing
☐ PAC/PAD Agreement
☐ Coverage(s)
☐ Requirements
☐ Linked Applications
☐ Validation
☐ Signature
☐ Signature Mode
☐ Signature and Follow-Up
☐ Transmission

Last name SHARED **First name(s)** FILE **Middle name (optional)**

Please indicate your name at birth, if different than above (optional)

Gender Male **Date of birth** January 02, 1990

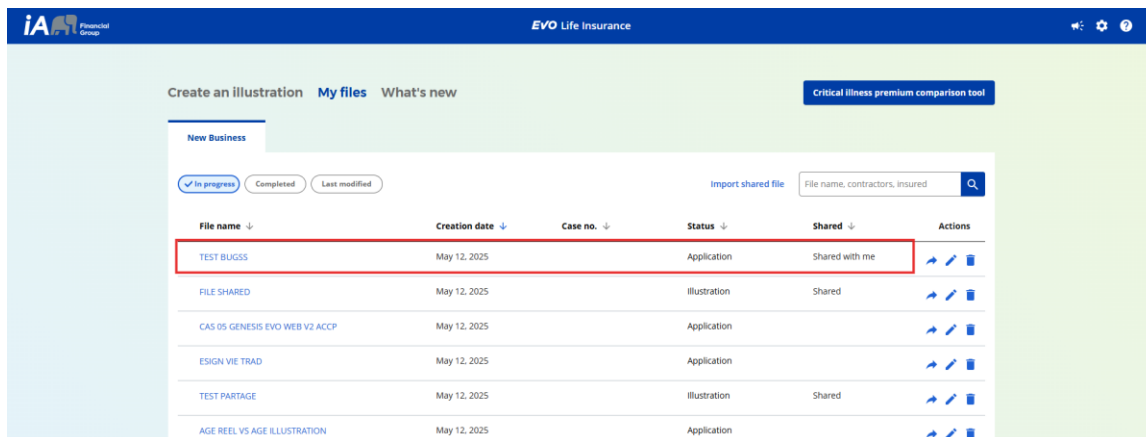
Address

Address
1080-220 Grande Allée E
Québec QC G1R 2J1
Canada

Contact

Home phone 514 777-7777 **Cell phone** **Work phone** **Extension (optional)**

You will also find the shared file in your **My files** section:



File name	Creation date	Case no.	Status	Shared	Actions
TEST BUGSS	May 12, 2025		Application	Shared with me	Link Edit Delete
FILE SHARED	May 12, 2025		Illustration	Shared	Link Edit Delete
CAS 05 GENESIS EVO WEB V2 ACCP	May 12, 2025		Application		Link Edit Delete
ESIGN VIE TRAD	May 12, 2025		Application		Link Edit Delete
TEST PARTAGE	May 12, 2025		Illustration	Shared	Link Edit Delete
AGE REEL VS AGE ILLUSTRATION	May 12, 2025		Application		Link Edit Delete

If the user needs to transfer the file again to the original sender or another user, they must follow the same case sharing procedure.

⚠ Error and warning message

Here is the message you may encounter:

Key already used to import a file or expired

EN: The shared key has already been used to import a file or has expired.