ivari

# Accessing policy contracts through webcappow from eNotification

Vhen you click on the link in your mail/text notification, you will be irected to the <b>Notifications</b> page	ivari"				Customer service:	1-800-846-5970 appow
n webcappow.	Notificat	ions	ch Distributor search Busine	ess activity * Reports		6
	Notifications					
	Category:	All		Type:	All	
	Action:	All		View type:	All	•
	From date:	01-03-2021		To date:	15-03-2021	
	This is now backdated I weeks. Be sure to chan to see updates made pr date.	by two ge the date rior to this				
	SEARCH CL	EAR				
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Click on either Policy contracts or Policy contracts release reminder in the Type field.	Select         Notice date         Category         Type         Action         Message           0         02-07-2020 4:20:38 PM         New business         Policy contracts         Action required         There are policy contracts available for download.
	Select         Notice date         Category         Type         Action         Message           11-03-2021 4:42:24 PM         New business         Policy contracts release reminder         Action required         You have one or more contracts which have not been released.
This will bring you to the <i>Policy contracts</i> tab on the <b>New business</b> page.	New business         Close out warnings         New business letters         Policy contracts
If this page was accessed using the <i>Policy contracts Type</i> , then it will default to all contracts within the past 45 days.	Advisor code: All  Advisor name: Policy number: Policy number: Policy number: Prom date: 29-01-2021 Prom date: Release status: All
If this page was accessed using the <i>Policy contracts release</i> <i>reminder Type</i> , then it will default to show all contracts that have not been released to the client within the previous 45 days.	Policy contracts Policy contracts will be available online until the end of delivery date. As an advisor, it is your responsibility to securely deliver the policy contract to your client. For most contracts, you can use the tool below. However, if you decided to download, please zp and encrypt the contract outside of this tool. Also, please remember to document all email communications. Policy Contract eDelivery tutorials Showing 1-4 out of 4 Record(s)
	Contract print date         Policy #         Owner name         View contract         End of delivery date         Advisor code         Distributor name         Release to client           04MAR2021         9*         VIEW         19JUN2021         Test Agent         Test Agent         START           25FEB2021         E         VIEW         12JUN2021         Test Agent         Test Agent         VIEW
	New business           eApp documents         Life new business         Close out warnings         New business letters         Policy contracts
	Advisor code: All  Advisor name: Policy number: Owner name
	From date: 29-01-2021
	Policy contracts Policy contracts will be available online until the end of delivery date. As an advisor, it is your responsibility to securely deliver the policy contract to your client. For most contracts, you can use the tool below. However, if you decided to download, please zip and encrypt the contract outside of this tool. Also, please remember to document all email communications. Policy Contract eDelivery tutorials
	Showing 1-4 out of 4 Record(s)       Contract print. date     Policy #     Owner name     View contract     End of delivery date     Advisor     Advisor     Distributor     Distributor     Release to client       04MAR2021     99     View     19JUN2021     Test Agent     Test Agent     START

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To search for a list of policies with a different status, choose the drop-down menu beside the <i>Release status</i> field, choose a status and click <b>SEARCH</b> .	New business         eApp documents       Life new business         Close out warnings       New business letter         Advisor code:       All         Policy number:	rs Policy contracts Advisor name: Owner name
	From date: 18-01-2021	To date: 04-03-2021
	SEARCH CLEAR Policy contracts	Release status:
You can also access the Policy contracts tab directly from the webcappow Home page by clicking on Business activity → <b>New business</b> → Policy contracts.	Home Client/policy search Advisor search Distributor search Business activity * Reports Notification overview Action required Informational In	Customer service: 1-800-846-5970  Webcappow?  Practs are now available for  Read more  COTIT  Dynacare videos
	New business       eApp documents       Life new business       Close out warnings       New business letters       Policy         Advisor code:       All       Image: Close out warnings       New business letters       Policy         Advisor code:       All       Image: Close out warnings       New business letters       Policy         Advisor code:       All       Image: Close out warnings       New business letters       Policy         Policy number:       Own       Own       Own       Own         From date:       29-01-2021       Image: Close out warnings       Release         SEARCH       CLEAR       CLEAR       Image: Close out warnings       New business letters	vecntracts



### Accessing a specific policy contract through webcappow

Click on <i>Client/policy search</i> in the top menu.		Customer service: 1-800-846-5970
	Hom Client/policy search definition tributor search Business activity* Reports	0 🔳
	Notification overview What's new in w	vebcappow? Quick links
	Action required  Actio	AppVantage ntracts are now available for Commission Read more GOT IT Dynacare videos
Type the specific policy number into the <i>Policy number field</i> . You can also do a client search using the last name and first name of a specific client. Then click <b>SEARCH</b> .	Client/policy search         Search by any of the following:         Policy number         Client number         First name         Max 25 characters         Show policy status in         All O Pending O Inforce/active O Closed         SEARCH	For investment policies only Corporate/joint Max 35 characters name
When the <i>Policy information</i> screen appears, click the <i>Contract</i> tab.	Client name: CLIENTEIGHTY-THREE PRODUCTS-LIFE         Policy #: 4F;           General         Coverage         Premium & payments         Values & loans         Financial activity         Contract           General         Coverage         Premium & payments         Values & loans         Financial activity         Contract           General         Policy type: LEVEL TERM         Policy statu         App received date: 14.JAN2021         Paid to date           Policy tate:         Color of the c	IN COLLAPSE ALL



### Overview of the Policy Contracts page in webcappow

Ρ	olicy contracts					
	Policy contracts will be available online until the end of delivery date.					
	As an advisor, it is your responsibility to securely deliver the policy contract to your client. For most contracts, you can use the tool below. However, if you decided to download, please zip and encrypt the contract outside of this tool.					
	Also, please remember to document all email communications.					
	Policy Contract eDelivery tutorials					

#### Contracts that are ready to be sent to the client(s) will display:

- A VIEW button in the View contract field. Click on this button to view the contract.
- A START button in the Release to client field. Click on this button to release the contract to the client(s).

Contract print date	Policy #	Owner name	View contract	End of delivery date	Advisor code	Advisor name	Distributor code	Distributor name	Release to client
01MAY2020		HEACLIENTGIVNM PANCLIENTSURNM	VIEW	22JUN2020		Test Agent		Test Agent	START

#### Contracts that have been sent to the client(s) will display:

- A VIEW button in the View contract field. Click on this button to view the contract.
- A **VIEW** button in the *Release to client* field. Click on this button to view the client(s) information, along with the message and documents you included when sending the contract to the client(s).

Note: The **VIEW** button in the *View contract* field will not change until both the client(s) and the advisor have signed the contract.

Contract print date	Policy #	Owner name	View contract	End of delivery date	Advisor code	Advisor name	Distributor code	Distributor name	Release to client
01MAY2020		TERM NUMBERTHIRTEEN	VIEW	29MAY2020		Test Agent		Test Agent	VIEW



#### Contracts that have been signed by both the client(s) and the advisor will display:

- A SIGNED button in the View contract field. Click this button to view the signed contract.
- A **VIEW** button in the *Release to client* field. Click on this button to view the client information, along with the message and documents you included when sending the contract to the client(s).

Contract print date	Policy #	Owner name	View contract	End of delivery date	Advisor code	Advisor name	Distributor code	Distributor name	Release to client
01MAY2020		ENGLISH OWNER	SIGNED	01JUL2020		Test Agent		Test Agent	VIEW

#### Note for distributors (Not applicable to WFG advisors):

As a distributor, the "Release to client" column will show as "N/A" until the advisor has released the contract to their client(s).

Once a contract has been released to the client(s) by the advisor, you will be able to click on the VIEW button to access the *Contract release information* page.

Contract print date	Policy #	Owner name	View contract	End of delivery date	Advisor code	Advisor name	Distributor code	Distributor name	Release to client
01MAY2020		TERM NUMBERTHIRTEEN	VIEW	29MAY2020		Test Agent		Test Agent	VIEW
01MAY2020		FRENCH TEST	VIEW	25JUN2020		Test Agent		Test Agent	N/A

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