



# Accessing policy contracts through webcappow from eNotification

When you click on the link in your email/text notification, you will be directed to the **Notifications** page on webcappow.

In the Type field, select *Policy contracts* or *Policy contracts release reminder* and click **SEARCH**.

Note: The *Policy contracts release reminder* Type will display a list of policies that have not yet been released to the client.

Click on either *Policy contracts* or *Policy contracts release reminder* in the *Type* field.

Select	Notice date	Category	Type	Action	Message
<input type="checkbox"/>	02-07-2020 4:20:38 PM	New business	Policy contracts	Action required	There are policy contracts available for download.
<input type="checkbox"/>	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 *Policy contracts* tab on the **New business** page.

If this page was accessed using the *Policy contracts* Type, then it will default to all contracts within the past 45 days.

If this page was accessed using the *Policy contracts release reminder* Type, then it will default to show all contracts that have not been released to the client within the previous 45 days.

**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 To date: 15-03-2021

Release status: All

SEARCH CLEAR

Hide filters

**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 code	Advisor name	Distributor code	Distributor name	Release to client
04MAR2021	9...		VIEW	19JUN2021		Test Agent		Test Agent	START
25FEB2021	5...		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 To date: 15-03-2021

Release status: Not Released

\*\*\*Contract that has not been released yet\*\*\*

SEARCH CLEAR

Hide filters

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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	Advisor name	Distributor code	Distributor name	Release to client
04MAR2021	99...		VIEW	19JUN2021		Test Agent		Test Agent	START

To search for a list of policies with a different status, choose the drop-down menu beside the *Release status* field, choose a status and click **SEARCH**.

**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: 18-01-2021

To date: 04-03-2021

Release status: All

SEARCH CLEAR

Policy contracts

You can also access the *Policy contracts* tab directly from the webcappow Home page by clicking on *Business activity* → **New business** → *Policy contracts*.

Customer service: 1-800-846-5970

webcappow

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Notifications

New business

Inforce

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Commission

Dynacare videos

**New business**

eApp documents Life new business Close out warnings New business letters Policy contracts

Advisor code: All

Advisor name:

Policy number:

Owner name:

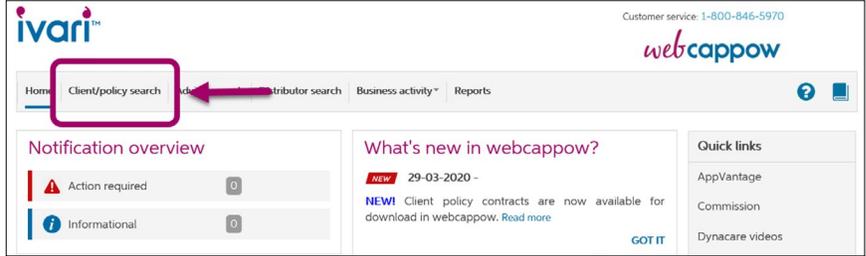
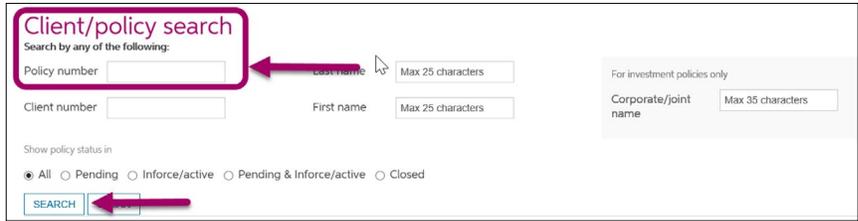
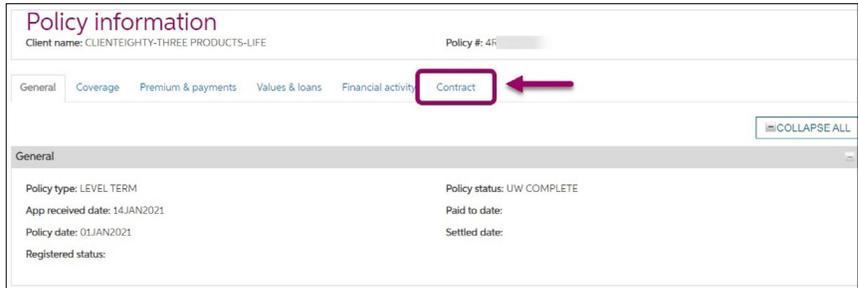
From date: 29-01-2021

To date: 15-03-2021

Release status: All

SEARCH CLEAR

## Accessing a specific policy contract through webcappow

<p>Click on <i>Client/policy search</i> in the top menu.</p>	
<p>Type the specific policy number into the <i>Policy number</i> field.</p> <p>You can also do a client search using the last name and first name of a specific client.</p> <p>Then click <b>SEARCH</b>.</p>	
<p>When the <i>Policy information</i> screen appears, click the <i>Contract</i> tab.</p>	

## Overview of the Policy Contracts page in webcappow

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](#)

### 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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