Releasing a policy contract to the client(s)

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 there is no release to client option displayed, you will have to download, zip and encrypt the contract outside of this tool.

Also, please remember to document all email communications.

For policies issued as of May 2nd, the policy contract pages are in a new order. Note, the Delivery receipt can be found on the last page.

Before you send the contract to the client(s):

From the *Policy contracts* page in webcappow, click the **VIEW** button in the *View contract* field to review the contract.

Once you are ready to send the contract to the client(s):

From the *Policy contracts* page, click the **START** button in the *Release to client* field.

Contract print date	Policy #	Owner name	View contract	End of delivery date	Advisor code	Advisor name	Distributor code	Distributor name	Release to client
01MAY2020	[illegible]	HEACLIENTGIVNM PANCLIENTSURNM	VIEW	22JUN2020	[illegible]	Test Agent	[illegible]	[illegible]	START
01MAY2020	[illegible]	ENGLISH OWNER	VIEW	01JUL2020	[illegible]	Test Agent	[illegible]	Test Agent	START
29APR2020	[illegible]	WINCLIENTGIVNM CLIENTSURNM	VIEW	13JUN2020	[illegible]	Test Agent	[illegible]	Test Agent	VIEW

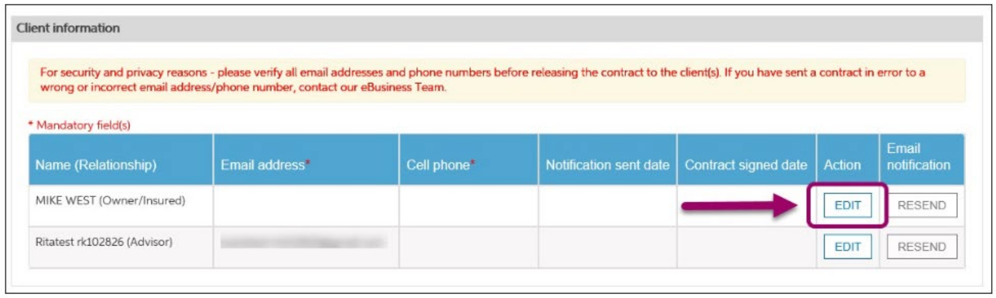
You will be taken to the *Contract release information* page.

Click the **EDIT** button in the *Action* field to enter the email address and cell phone number of each client.

Then, click the **EDIT** button in the *Action* field to enter your cell phone number. As the advisor, your email address is already populated.

NOTE: If the owner and the insured are the same, you will only need to enter their contact information once.

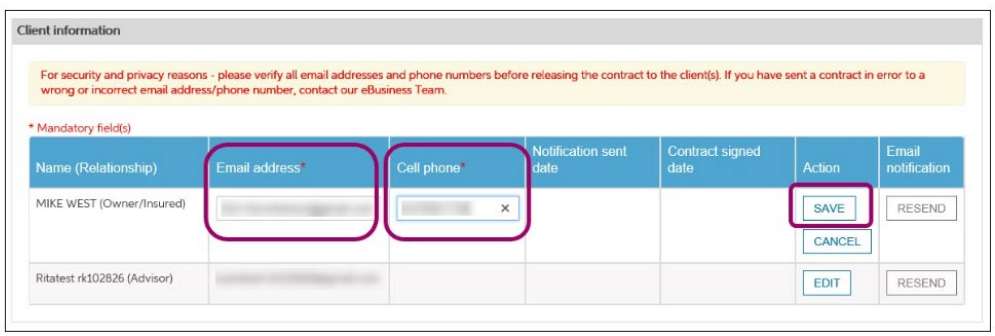
If the owner and the insured are different, you must enter their corresponding contact information as they will each receive a separate email for the review and signing process.



Once you've entered the email address(es) and cell phone number(s) for the client(s) and yourself, click the **SAVE** button.

<u>Take a moment to ensure that all the contact information you entered is correct. If you need to make a correction, click **EDIT**, make the change, and click **SAVE** again.</u>

NOTE: The client(s) must have a cell phone number in order to receive the security code to access the policy contract.



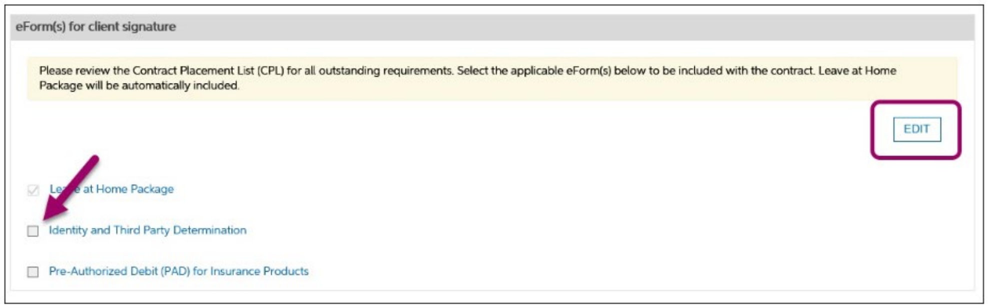
In the *eForm(s) for client signature* section, the Identity and Third Party Determination form and the Pre-Authorized Debit (PAD) for Insurance Products form are available with DocuSign functionality so the client(s) can complete and sign them electronically.

If these forms are required, click the **EDIT** button and select the checkbox next to the specific form(s).

Review the Contract Placement List for all outstanding requirements to be sent to the client(s).

If there are any other required forms, you can attach them in the *Document(s) and message* section below.

Note: The Leave at Home Package is automatically included for your client.



When you select the eForm(s), you will be prompted to answer additional questions.

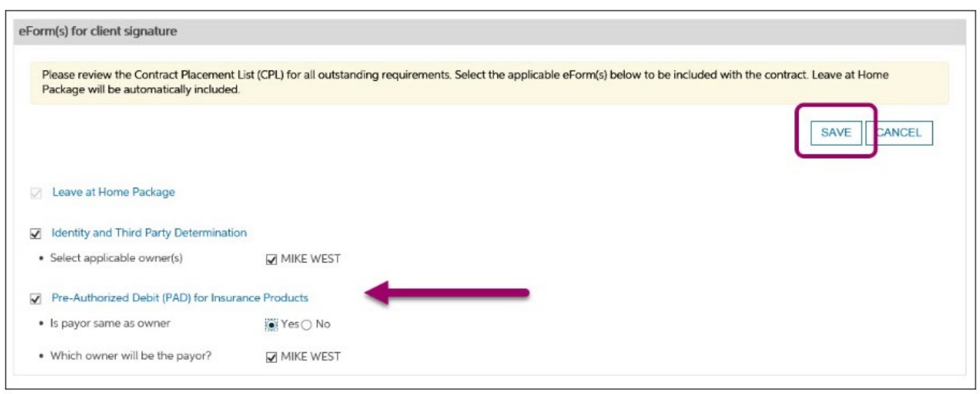
For example:

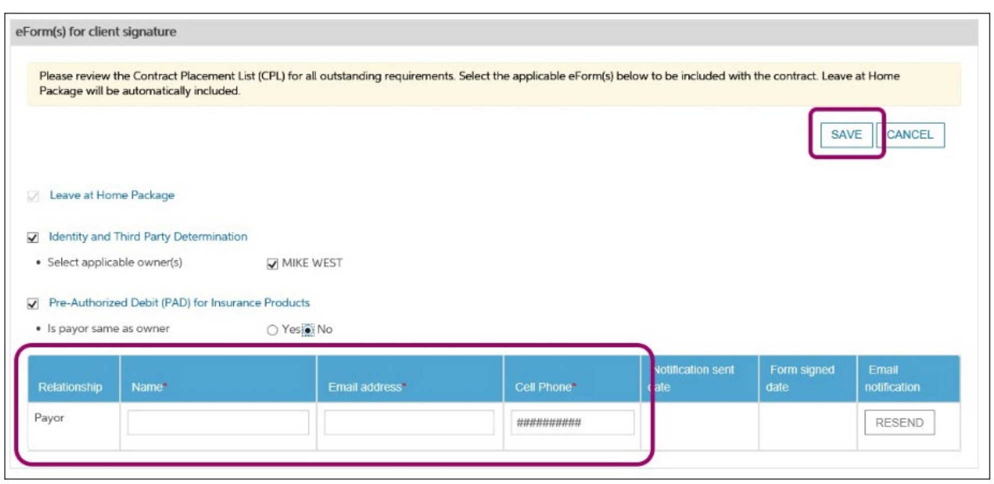
If there is more than one owner and the Identity and Third Party Determination form is required for one of them, you will need to select the owner it applies to.

If the payor is different from the owner, you will need to enter the payor details.

Once you've selected the form(s) and answered the related question(s), click **SAVE**.

Note: If you close the *Contract release information* page before clicking the **SAVE** button in this section, any information you selected or added here will be removed.





If any additional documents or forms are required, you will need to download and save them to your computer/device before completing this step.

To do this, first click the **EDIT** button and then click the **Forms search** button, locate the form, download and save it to your computer/device.

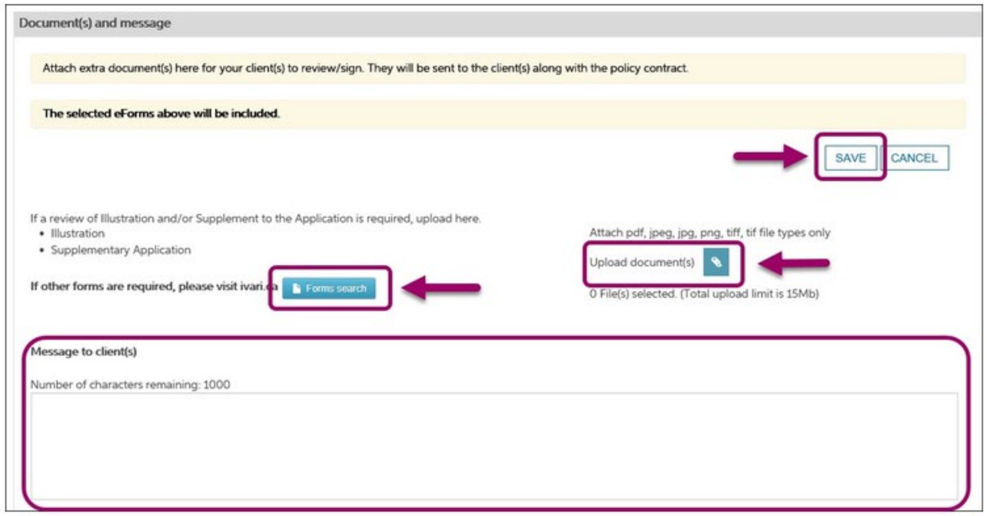
Return to this page to upload. Click the paperclip icon on the right-hand side of the screen, choose the document from your computer/device, and follow the instructions to upload.

In the message section, you can choose to enter a message to your client(s) about how

to contact you to review their policy.

Once you have attached all documents and entered your message to the client(s), click the **SAVE** button.

Note: If you close the *Contract release information* page before clicking the SAVE button in this section, any message or documents you added here will be removed.



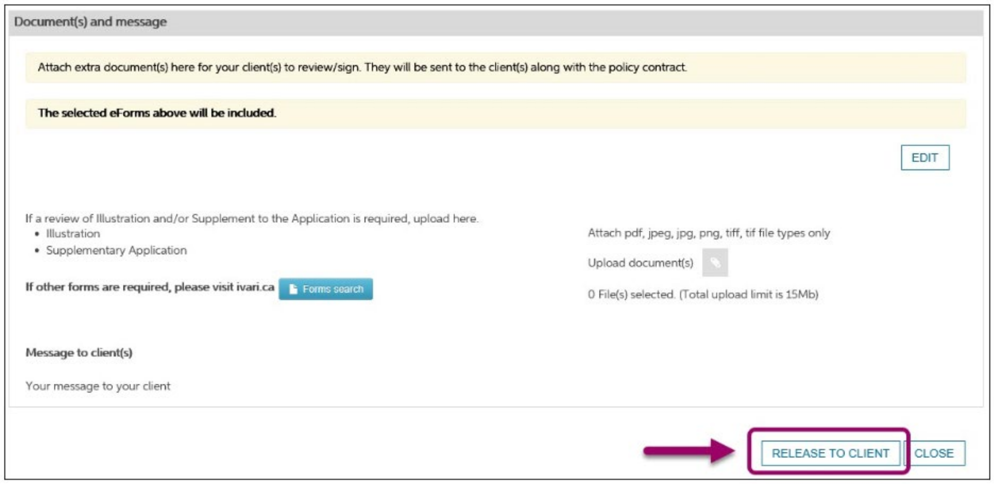
Take another moment to ensure the client(s) contact information was entered correctly.

Once you have completed all the steps, click the R**ELEASE TO CLIENT** button.

If you need additional time before sending to your client, click **CLOSE**. You can return to this step at any time.

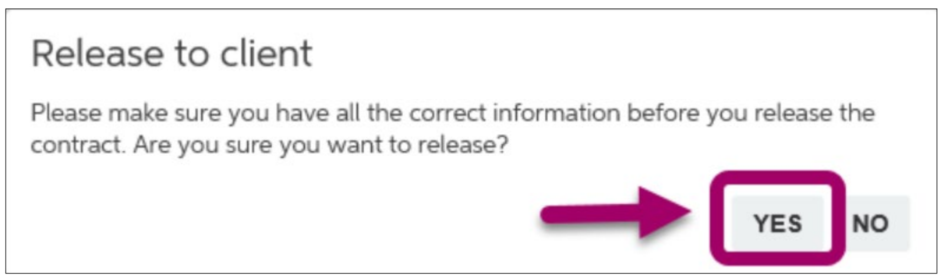
If the **RELEASE TO CLIENT** button is greyed out, it means either one or more mandatory fields in the *Client Information* section have not been completed, or you have not clicked on the **SAVE** button in one of the above sections.

Note: Contracts are available to view and release until the end of delivery date.

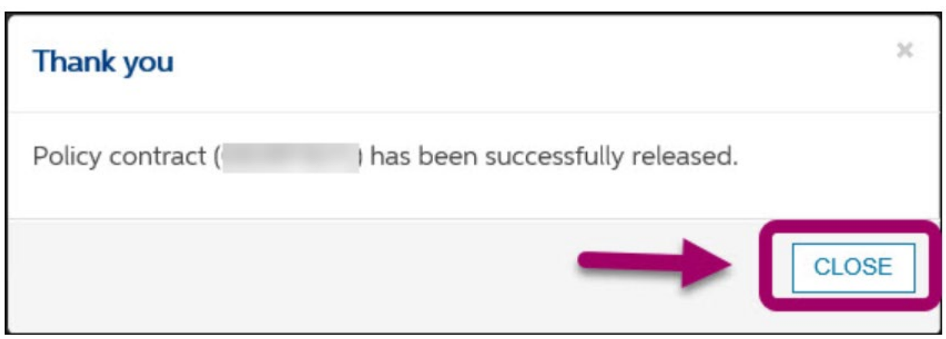


A dialogue box will appear asking you to confirm. Click **YES**.

If you click **NO**, the dialogue box will close, and you will remain on the *Contract Release Information* page where you can make any necessary changes.



A dialogue box will appear confirming that the policy contract has been released to the client. Click **CLOSE**.



Once the contract has been sent, refresh your browser. A date will appear in the *Notification sent date* field for the insured, if different from the owner, as they are first to review the contract.

If the notification was not successfully sent to the client(s), this field will remain blank. If this happens, you must contact *ivari*'s eBusiness team for assistance.

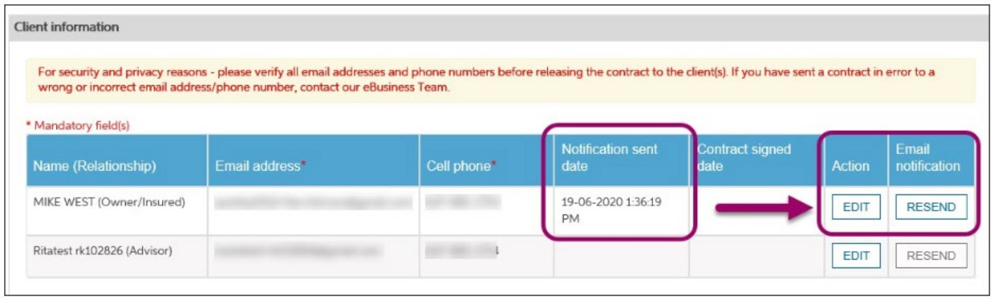
If the notification was successfully sent but you notice the client(s) contact information was incorrectly entered, click the **EDIT** button to make the necessary changes and then click **RESEND**.

You can only edit the contact Information for a client that has not yet signed.

You can also resend the email notification to the same email address if the client has misplaced their original email.

If you accidentally release a policy contract to the wrong person (i.e. you enter the email address and corresponding phone number of someone other than the intended client) you <u>must</u> contact eBusiness immediately at 1-800-646-1481 to report this potential privacy breach.

Note: If the owner and the insured are different, the insured must complete their review and signing process first, before a notification email is sent to the owner(s).



For advisor use only

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