



Client review and signing of policy contract – Insured

This job aid will help you guide your clients through the review and signing process as the insured life. Once you have released the contract to your clients, they will receive an email from ivari (ePolicies@ivari.ca). (Note: Please do not share this job aid with your clients.)

If the owner and insured are the same, they only need to follow these steps once as the owner.

Upon receipt of the email from ivari, the client must click the link to proceed to the security confirmation process.

From: ivari ePolicies<ePolicies@ivari.ca>
Date: Fri, May 1, 2020 at 6:51 PM
Subject: Your ivari insurance policy is ready for review/Examen de votre police d'assurance ivari



Hello PETER WEST,

Thank you for choosing ivari. Your ivari policy contract is ready for your review.

- To view and sign the contract, please use this [link](#) and follow the simple steps.
- When completing the required document(s), you will be guided to where you need to add information and sign.
- If you have any questions, please contact your advisor.

Thank you,
The ivari team

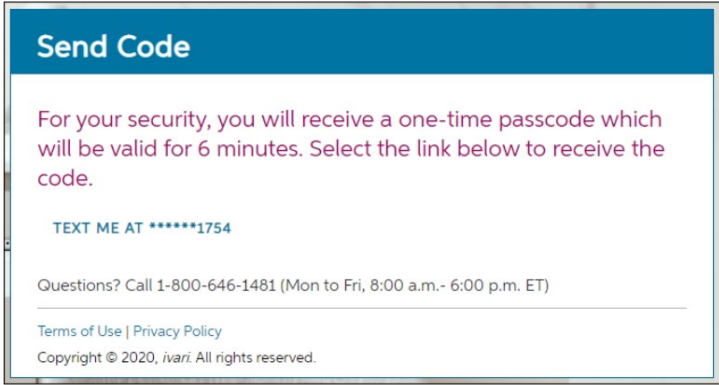
This email was sent to _____ from ivari as an activity notification. This is an automated message and direct replies to this address are not monitored.

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500-5000 Yonge St., Toronto, ON M2N 7J8, Canada

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A new webpage will open. The client must click the "TEXT ME AT..." link to receive a security code.

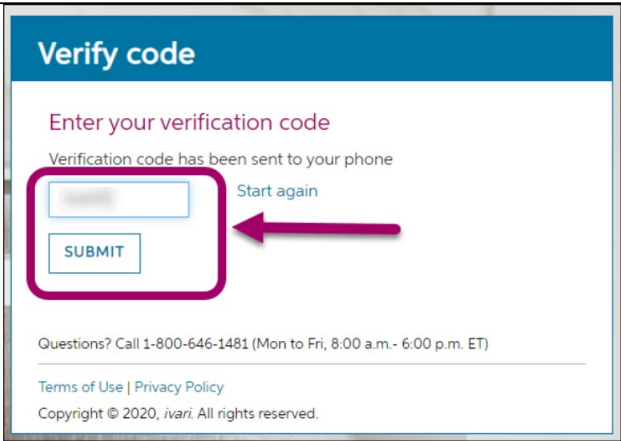
The client should be near the device receiving the security code as the code will only be available for 6 minutes.



A new screen will appear. The client must enter the code from the text and click **SUBMIT**.

If they make a mistake, they can click **Start again** to receive a new code.

Note: The client has a maximum of 5 tries to enter the passcode correctly. After that, they must wait 5 minutes before they can request a new code.



The client will then be taken to the **Policy contract review and signing** page.

Here they can review any messages that you have entered.

Next, the client should click on the **Review and sign your policy contract** link.

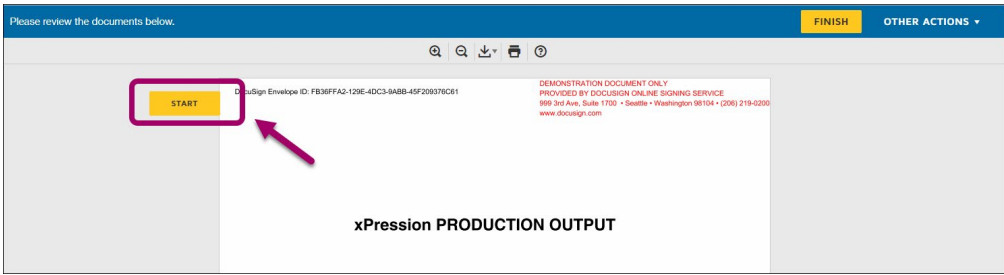


At the top of the page, a message bar will appear. The client should check the box beside "I agree to use electronic records and signatures" and then click **CONTINUE**.

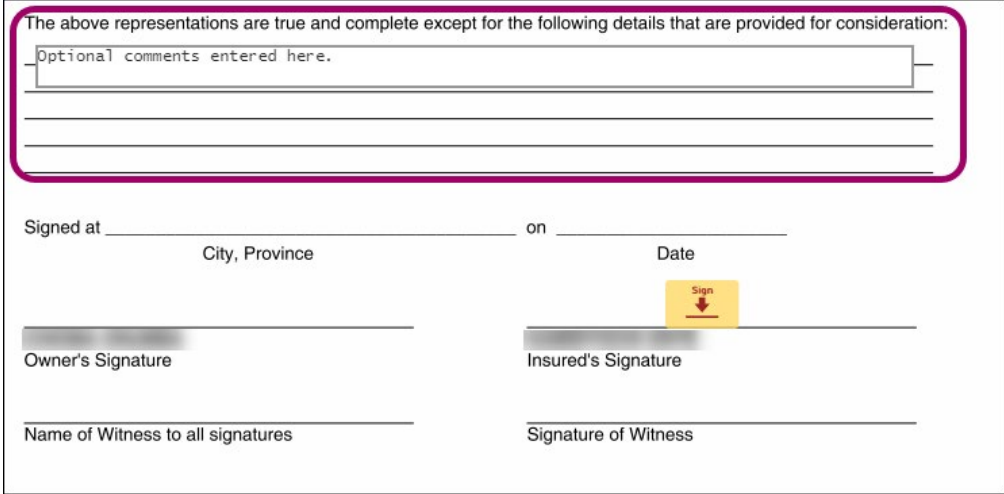
Note: Each page of the policy contract should be carefully reviewed by the client before they sign the Delivery Receipt and amendments, if any.



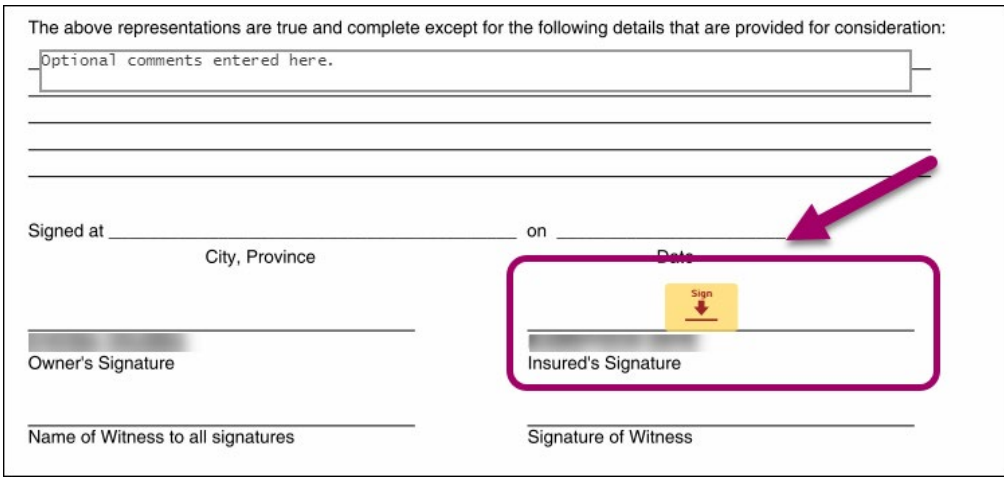
When the client is ready to start the signing process, they must click the **START** button. That will take them to the first spot in the document that needs to be signed.


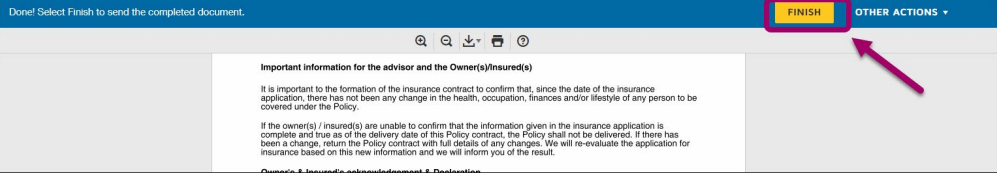
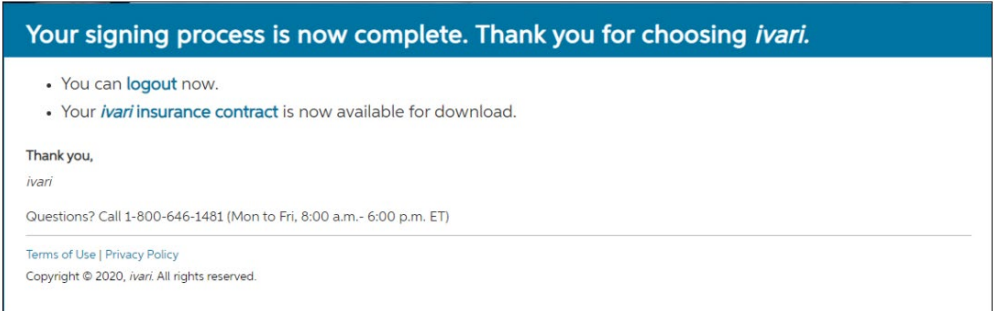


If the client needs to include comments related to a change in health, etc., they can use the insured comments section.



The client must click on the **Sign** button to start the signing process as the insured.



<p>Using their mouse, stylus or finger, the client must draw their signature in the box.</p> <p>The signature must be inside the box and must meet a minimum length requirement to be accepted by the system.</p> <p>Once satisfied, the client should click ADOPT AND SIGN.</p> <p>They will automatically be taken to the next spot in the document that requires signing.</p>	
<p>Once all signatures have been applied, a message will appear at the top of the screen indicating that the process is complete. The client should click FINISH.</p>	
<p>A confirmation page will appear stating that the insured signing process is complete. The client can now close this webpage.</p>	

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