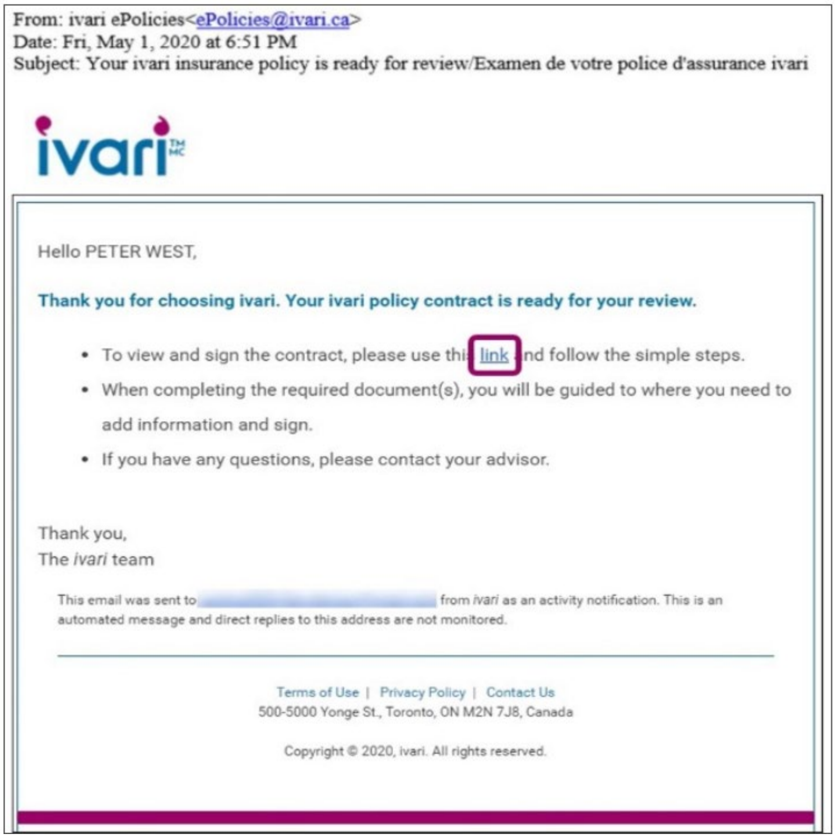
Client review and signing of policy contract – Owner

This job aid will help you guide your clients through the review and signing process as the policy owner. 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 would only need to follow these steps once.

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

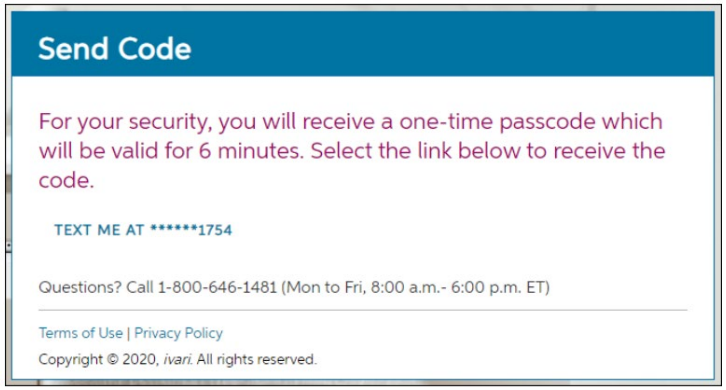
This email was sent to from *ivari* as an activity notification. This is an automated message and direct replies to this address are not monitored.

Terms of Use | Privacy Policy | Contact Us
500-5000 Yonge St., Toronto, ON M2N 7J8, Canada

Copyright © 2020, ivari. All rights reserved.

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

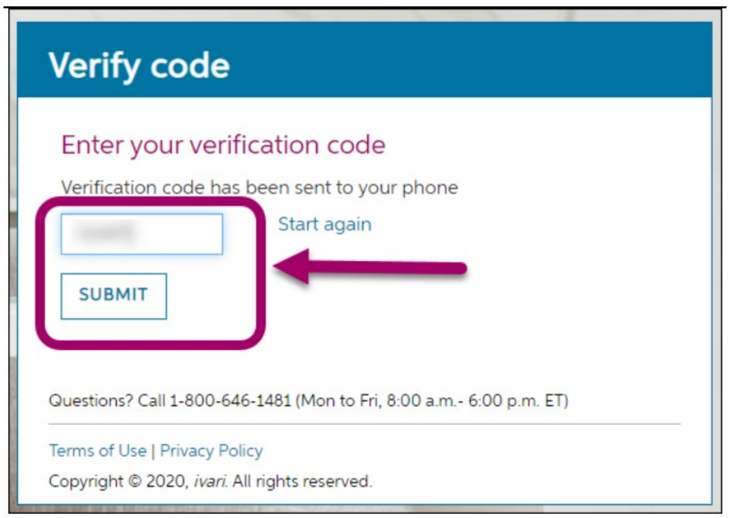
The client should be near the device receiving the security code as the code will only be available for 6 minutes.



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.

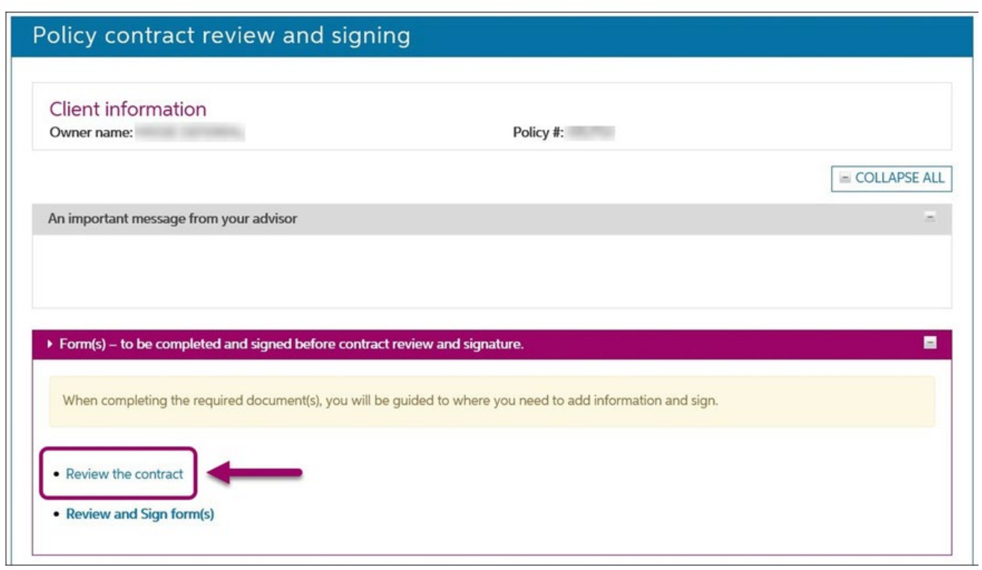
Note: The client has a maximum of 5 tries to enter the passcode correctly. After that, they must wait 5 minutes before they can request a new code.



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

Here they can review any messages that you have entered.

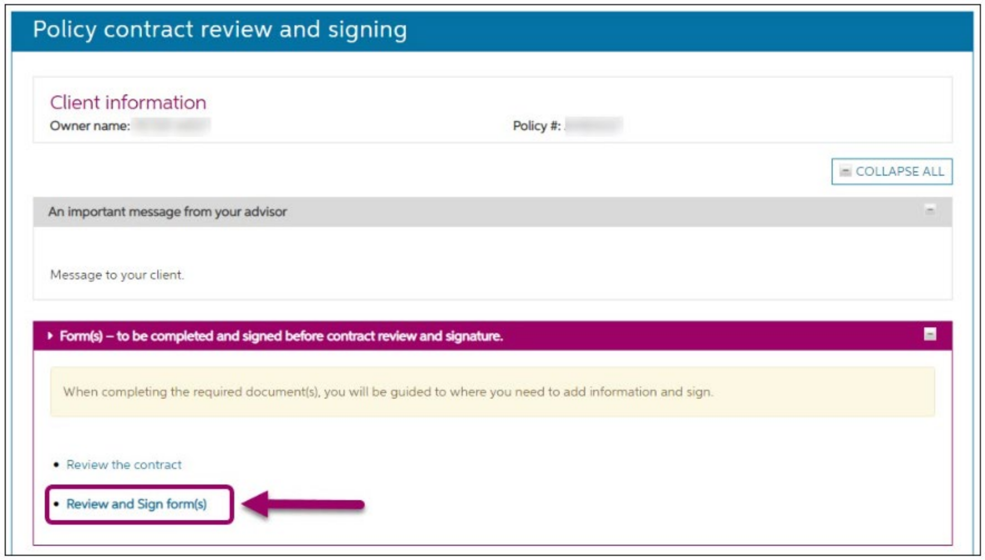
Before moving on, the client should click on *Review the contract* to read through their contract.



There may be additional forms that require review and/or signature from the policy owner.

The client should click on the *Review and Sign form(s)* link.

The client must complete and sign all of the required form(s) before they are able to sign the policy contract.



At the top of the page, a message bar will appear.

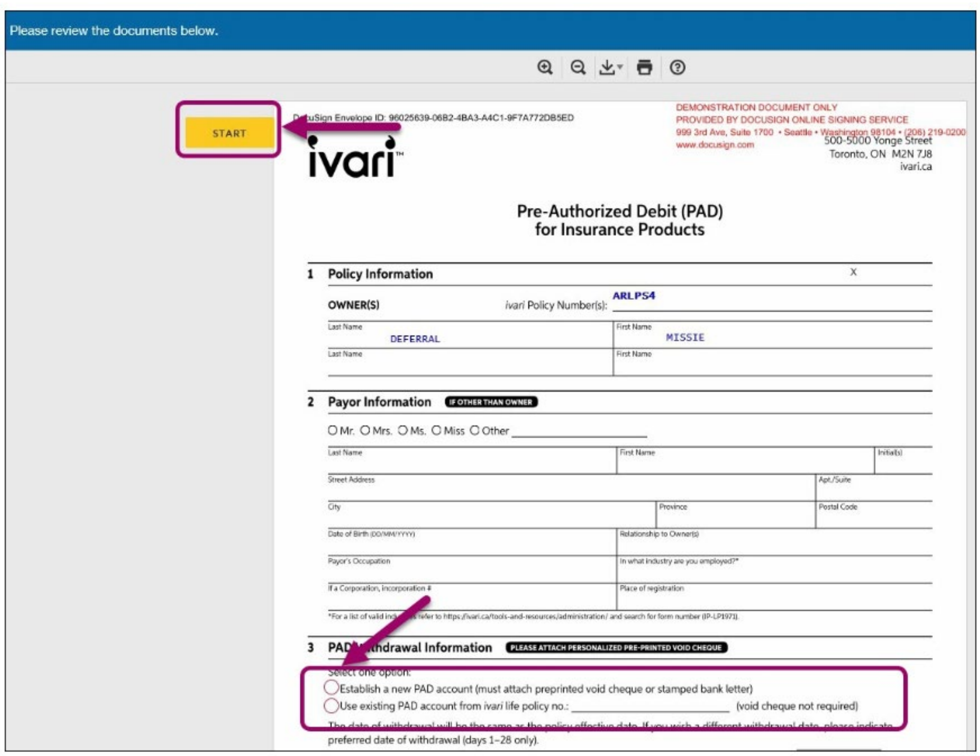
The client should check the box beside *"I agree to use electronic records and signatures"* and then click **CONTINUE**.

When the client is ready to start the signing process, they must click the **START** button.

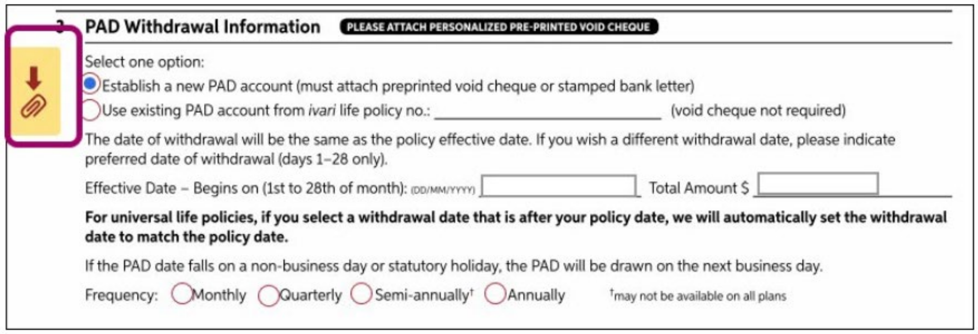
That will take them to the first spot in the document that needs to be signed.

Certain sections of the form(s) will be auto-populated.

Mandatory sections to be completed will be indicated in red.



If additional documents such as a pre-printed void cheque are required, the client must click on the paperclip icon to attach it.



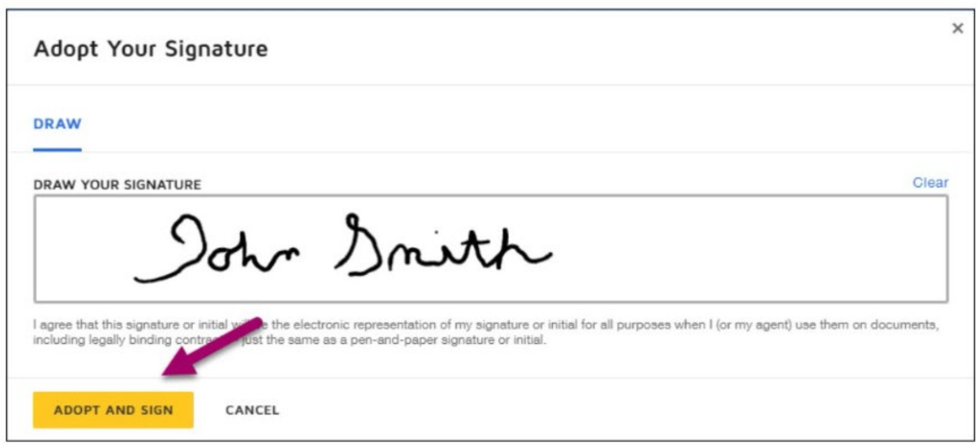
The client must click on the **Sign** button to start the signing process as the owner.

Using their mouse, stylus or finger, the client must draw their signature in the box.

The signature must be inside the box and must meet a minimum length requirement to be accepted by the system.

Once satisfied, the client should click **ADOPT AND SIGN**.

They will automatically be taken to the next spot in the document that requires signing.



Once all sections have been completed, document(s) attached and signatures applied, a message will appear at the top left-hand side of the screen indicating that the process is complete. The client should click **FINISH**.

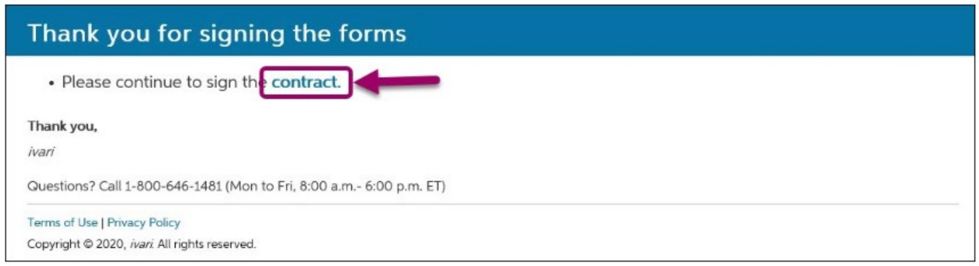
<table>
<tr>
<td>

A confirmation page will appear.

The client can now proceed to the signing of the policy contract by clicking on **Contract**.

It will take a few seconds for the *Review and sign your policy contract* link to be activated.

</td>
<td>

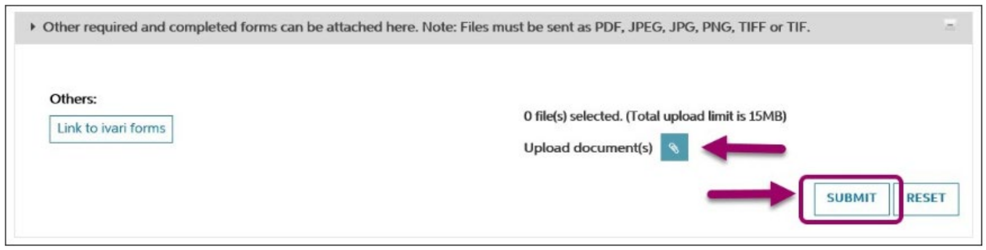


</td>
</tr>
<tr>
<td>

This will bring the client back to the **Policy contract review and signing** page.

If the client has completed and signed any other required forms, they can use the paperclip icon to upload those forms here, and then click **SUBMIT**.

</td>
<td>

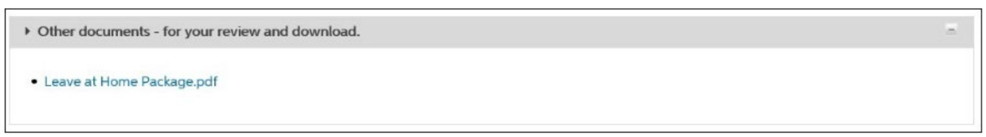


</td>
</tr>
<tr>
<td>

Any other documents or forms that you have uploaded for the client to review or complete will be available under the **Other documents – for your review and download** section.

The Leave at Home Package will always be included.

</td>
<td>



</td>
</tr>
<tr>
<td>

Next they should click the **Review and sign your policy contract** link.

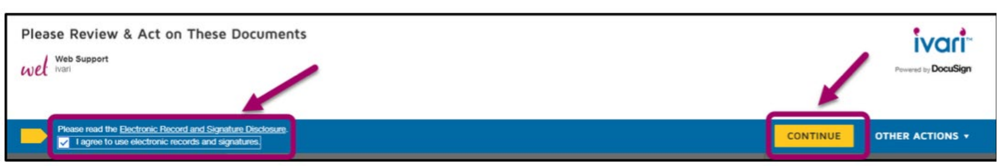
</td>
<td>

</td>
</tr>
<tr>
<td>

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.

</td>
<td>



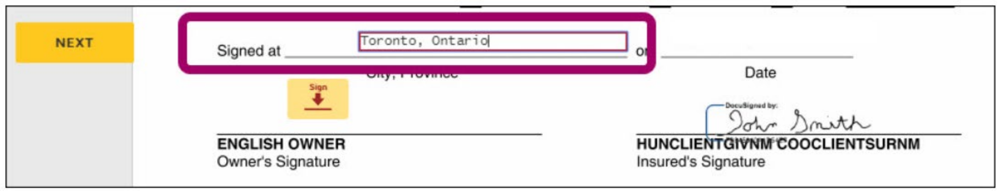
</td>
</tr>
</table>

When the client is ready to start the signing process, they must click the **START** button.

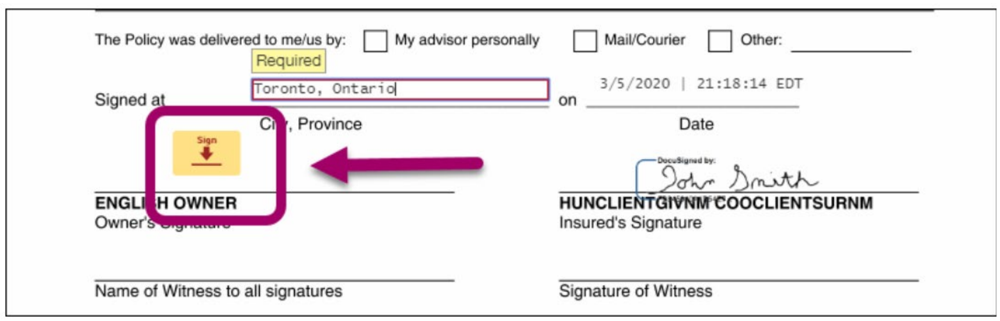
That will take them to the first spot in the document that needs to be signed.

The client should click in the *Signed at* field to enter the city and province that the contract is being signed in.

The date and time field will auto-populate when the first owner has opened this document.



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

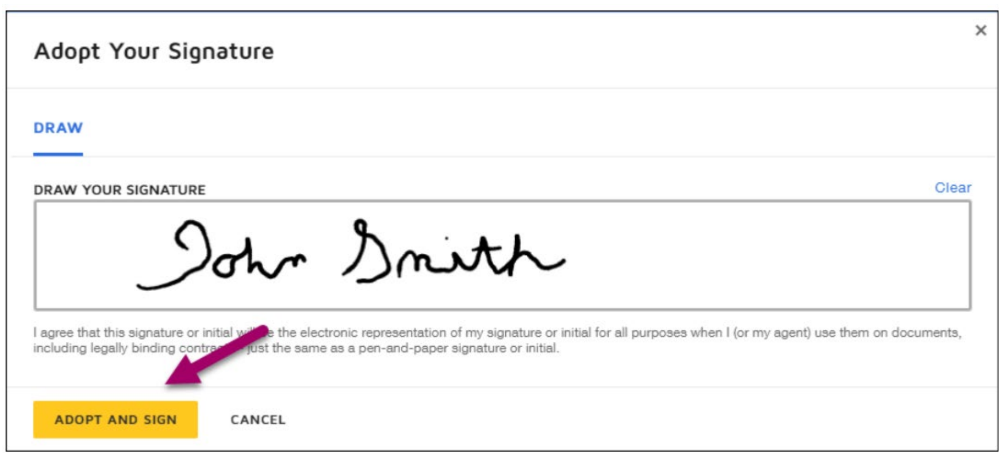


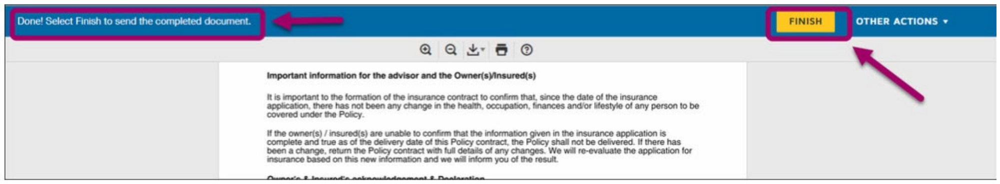
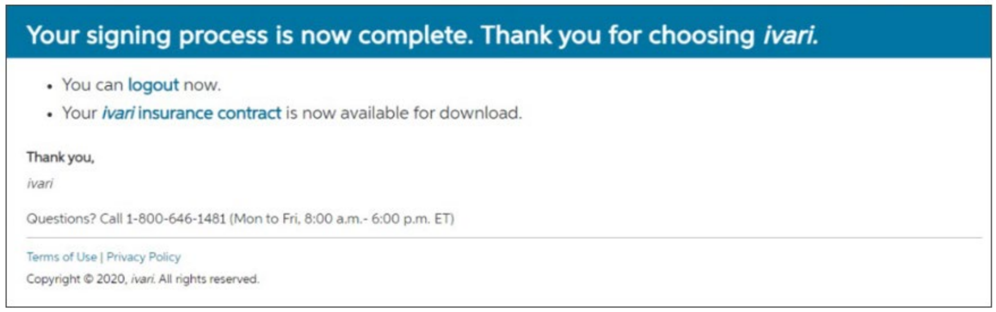
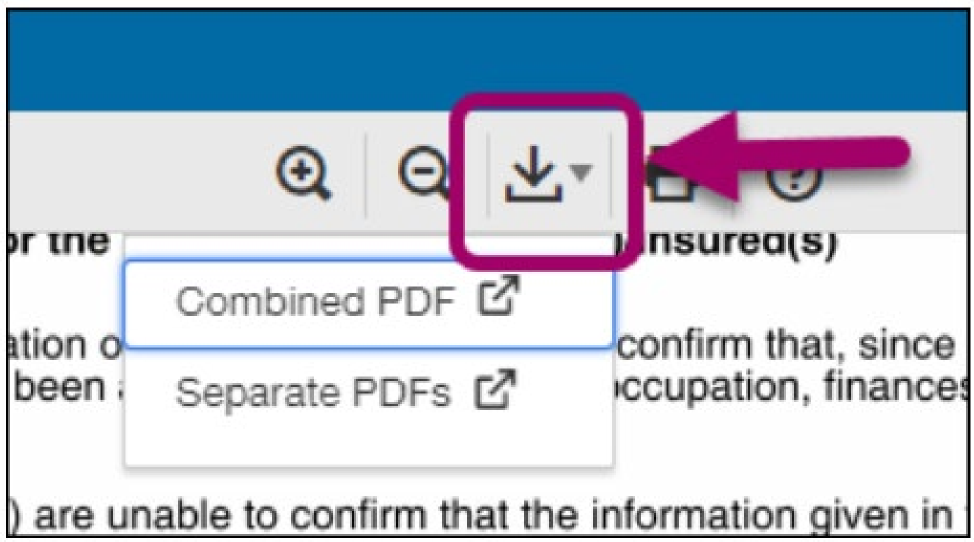
Using their mouse, stylus or finger, the client must draw their signature in the box.

The signature must be inside the box and must meet a minimum length requirement to be accepted by the system.

Once satisfied, the client should click **ADOPT AND SIGN**.

They will automatically be taken to the next spot in the document that requires signing.



Once all signatures have been applied, a message will appear at the top left-hand side of the screen indicating that the process is complete. The client should click **FINISH**.	
A confirmation page will appear.	
The policy owner must download and save the policy contract to accept delivery before logging out. As the advisor, it is your responsibility to ensure that the client(s) has successfully downloaded their contract.	

For advisor use only

IV2037 6/20