



Advisor review of policy contract and signing

Once a policy has been signed by both the insured and owner, you will receive an email from *ivari* (ePolicies@ivari.ca).

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 Servicing Advisor,

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

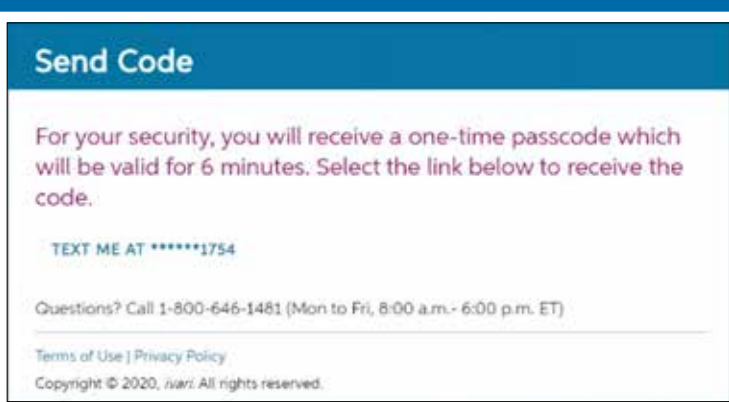
- To view and sign the contract, please use this [link](#) and follow the simple steps.
- When completing the required document(s), you will be guided to where you need to add information and sign.

Thank you,
The *ivari* team

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

A new webpage will open. Click the “TEXT ME AT...” link to receive a security code.

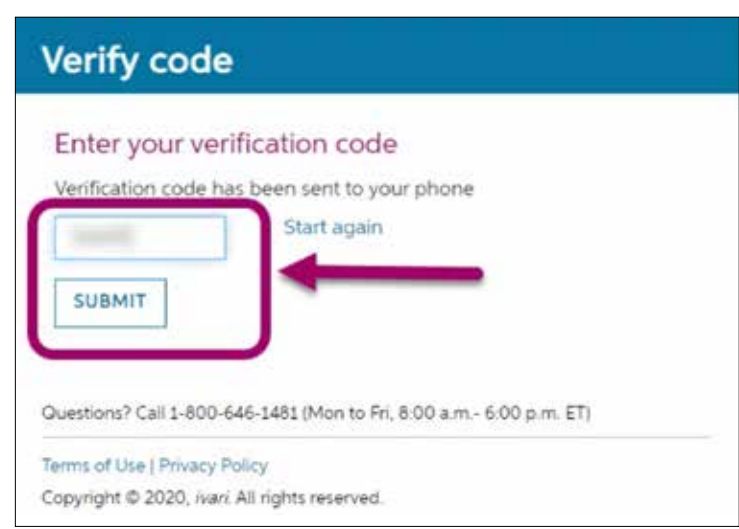
You should be near the device receiving the code as it will only be available for 6 minutes.



A new screen will appear. Enter the code from the text and click **SUBMIT**.

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

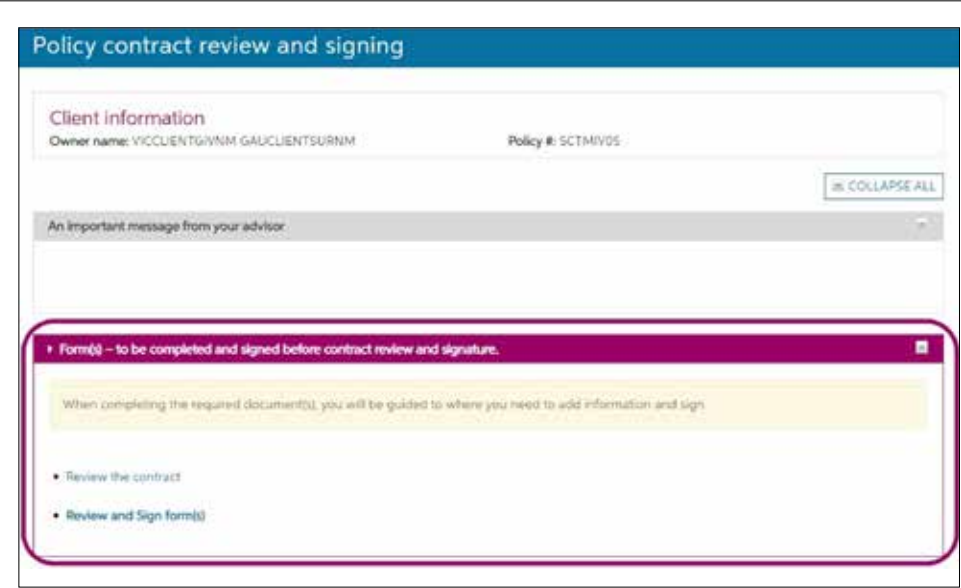
Note: You have a maximum of 5 tries to enter the passcode correctly. After that, you must wait for 5 minutes before you can request a new code.



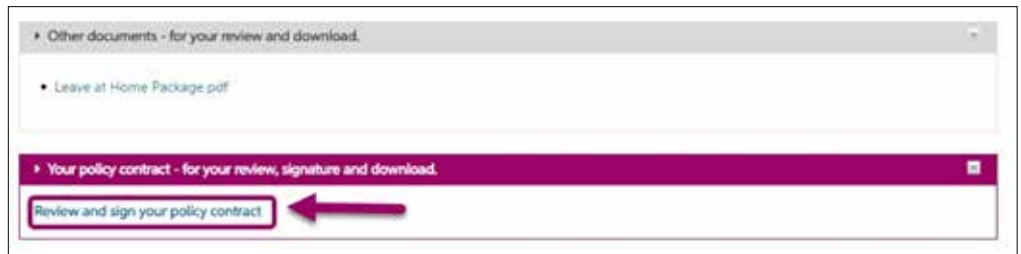
Once you have entered the correct code, you will be directed to the **Policy contract review and signing** page for the specific policy contract.

Additional documents that the client(s) has completed will be attached; ensure that you open and review each one for accuracy.

If any of the documents are incorrect or have missing information and/or signatures, please obtain the revised documents from your client(s). You can then upload those as you usually would in webcappow, under the *Delivery Requirements* section on the **Client information** page.



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



At the top left-hand side of the page, a message bar will appear. Check the box beside "I agree to use electronic records and signatures" and then click **CONTINUE**.



Before signing, review the policy contract again to ensure it is in good order.

Then, click the **START** button to be taken to the Contract Placement List for signing.

Review the Contract Placement List carefully to ensure all delivery requirements have been sent back by the client(s).



Click the **Sign** button to begin signing.


Advisor Report

Instructions to Advisor:

- By signing and returning this form with a payment for the premium(s) due and with all delivery requirements listed above to place the policy, I confirm having delivered the policy and having reviewed the policy contract with the policyowner.
- To prevent delay in the settlement of the policy, provide permission in **Comments** section to draw required premium(s), including all back premiums from client's bank account, if applicable.
- If **reissuing** a policy specify the changes requested in the **Comments** section and submit together with any completed delivery requirements.
- If a policy is **not taken** provide the reason why in the **Comments** section.

Instructions from Advisor:

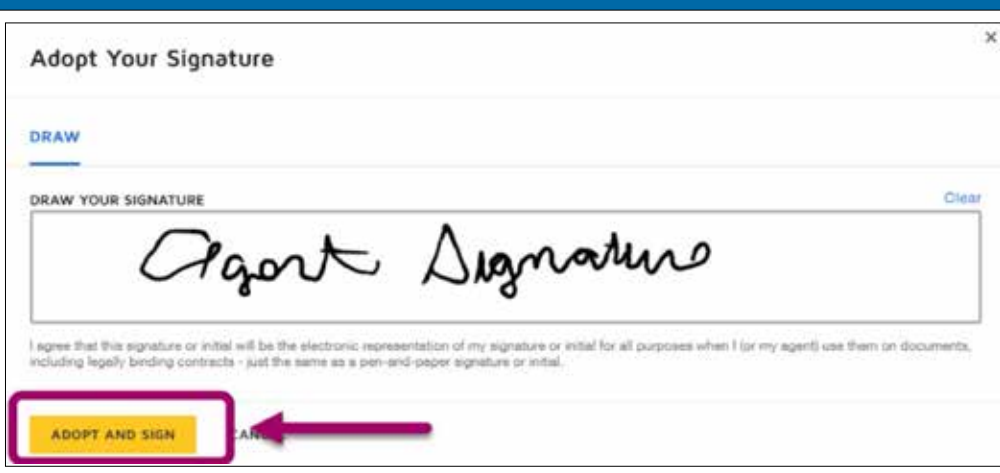
Comments:

Advisor Signature:  _____ Date Delivered: 4/2/2022 | 11:45:15 EST

Using your mouse, stylus or finger, draw your signature in the box.

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

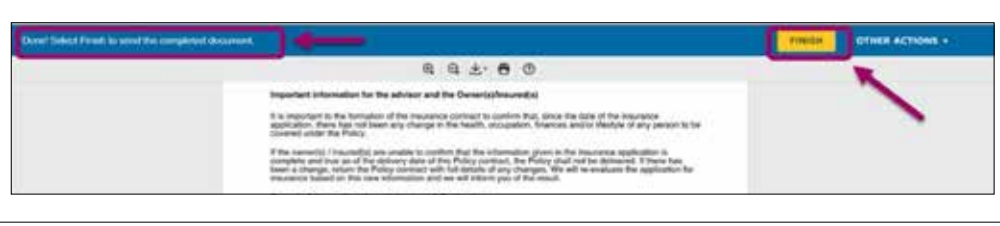
Once you are satisfied, click **ADOPT AND SIGN**.



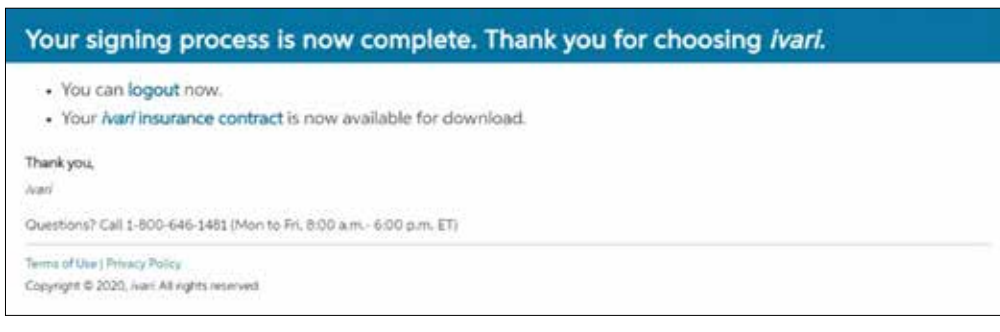
Once your signature has been applied, a message will appear giving you the option to enter a note to ivari. This is optional.



Once all signatures have been applied, a message will appear at the top of the screen indicating that the process is complete. You can then click **FINISH**.



A confirmation page will appear.



On the **Policy Contracts** page in webcappow, the *View contract* field will have a **SIGNED** button, and the *Release to client* field will have a **VIEW** button.

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

Click the **VIEW** button in the Release to client field to be taken to the *Contract release information* page.

Refresh your browser. A date will now appear in both the *Notification sent date* and the *Contract signed date* fields for both you and the client(s).

Once a client has signed, this page is now locked and cannot be changed. If you have entered an incorrect email or cell phone number, please contact ivari's eBusiness team at 1-800-646-1481 immediately.

Client information

For security and privacy reasons - please verify all email addresses and phone numbers before releasing the contract to the client(s). If you have sent a contract in error to a wrong or incorrect email address/phone number, contact our eBusiness Team.

* Mandatory field(s)

Name (Relationship)	Email address	Cell phone	Notification sent date	Contract signed date	Action	Email notification
MISSE DEFERRAL (Owner/Insured)	[REDACTED]	[REDACTED]	20-06-2020 10:48:19 PM	21-06-2020 1:10:18 AM	EDIT	RESEND
MelissaSenAdv Modelbestact (Advisor)	[REDACTED]	[REDACTED]	25-05-2020 1:10:33 AM	21-05-2020 1:14:50 AM	EDIT	RESEND

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