advisor portal

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New advisor portal and eApplication FAQ

This FAQ is designed to help you understand the new advisor portal and eApplication, including what's changing, what stays the same for now and which application to use for different products.

Use it as a quick reference during the transition as ivari continues to build a more streamlined, connected digital experience for advisors and their clients.

Advisor portal

▶ Why do we have this new portal?

The new advisor portal is your one-stop hub designed to bring tools, tasks and information together in one easy-to-navigate experience. It gives you one place to start and track applications, manage your business, view updates and access important resources.

The portal you see today is just the beginning and will continue to evolve with more tools, features and business information over time.

▶ How do I access the new advisor portal?

You can access the new portal using your existing webcappow login credentials. If you currently have access based on your role, that access will carry over to the new portal experience.

▶ What is happening to webcappow?

webcappow is not going away right now. Over time, the advisor portal will continue to expand with more features and updates, including access to existing tools and business information currently in webcappow.

New eApplication

▶ Why do we have two applications?

For a period of time, there will be two different applications based on the product your client is applying for. The new eApplication supports Simply Life, Simply Term and Smart*Select* Term.

▶ ivari 360 must be used for all other Term, Universal Life and Critical Illness products.

As well, any in-progress Simply Life or Simply Term applications that were started in ivari 360 must be submitted in ivari 360.

▶ When should I use the new application?

You should use the new eApplication for two main reasons: it's where you'll apply for Simply and Smart*Select* products, and it includes new features that can help make the application process faster and easier. These include a centralized dashboard, autofill, Canada Post address lookup, real-time banking validation, Product Comparison functionality and a responsive design that works across devices.

▶ How do I know what application to use and when?

Use this quick rule: Simply Life, Simply Term and Smart*Select* Term use the new eApplication. All other products use ivari 360.

▶ Where are the illustrations in the new eApplication?

Illustrations are not currently available in the new eApplication. However, you can use the Product Comparison feature to enter basic client details and view coverage options based on age and gender. This makes it easier to compare face amounts and PAD amounts for different coverage options. The modern slider also lets you adjust face amounts visually and instantly see monthly premiums.

▶ Can I use the new eApplication on a tablet or phone?

Yes. The new eApplication is responsive and can be used across devices, including tablets and phones. Advisors can also toggle between English and French to support the client conversation.

▶ How was the new eApplication created?

We're proud to say that our new eApplication was built entirely in-house by the ivari IT team. This allowed us to take your feedback and pain points into account during development.

▶ What are some key features of the new eApplication?

- Centralized dashboard with advanced filters to help advisors find, track and manage applications across statuses, advisor codes and reports.
- Smarter data entry tools, including autofill, Canada Post address lookup, automatic unit conversion and real-time banking validation.
- Upfront eligibility questions, real-time premium calculations and Product Comparison functionality to make the process faster and more transparent.
- Product qualification visibility and renewal premiums shown upfront, so advisors and clients know what to expect.
- Document upload, guided completion checks, reflexive questions, secure DocuSign workflows, privacy controls and a full audit trail to support accuracy, security and compliance.
- A step-by-step guided tour to help advisors move through the application.

Applications for Universal Life, Critical Illness and Term products

▶ Can I still use ivari 360?

Yes. **ivari 360 is still available and should be used for all other Term, Universal Life and Critical Illness products.** You should also continue using ivari 360 to complete any applications that were started there. Once you start an application in one tool, you need to finish it in that same tool.

▶ What are the transition dates for Simply applications started in ivari 360?

Simply Guaranteed, Simply Simplified and Simply Term applications can not be created in ivari 360 after September 15.. After that deadline, all Simply applications must be created in the new eApplication.

For existing Simply applications already started in ivari 360, there is a 7-day submission window. These applications must be fully submitted by 8:00 p.m. EST on Monday, September 21.

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