



Policy delivery requirements – On webcappow!

What's happening?

1. eNotifications for outstanding requirements



Late last year, **we let you know** that you will receive eNotifications for any outstanding underwriting or delivery requirements. In addition to being able to respond directly within webcappow, you can now upload Underwriting questionnaires and New Business delivery documents.

Heads up! – As of May 28, for most outstanding requirements and courtesy notifications, eNotifications will replace the emails you receive from your Case Coordinator. However, if the outstanding requirement is needed to setup the policy, you will receive an email.

2. NEW! File uploads

You can now upload a file directly through the client page for Underwriting and New Business on webcappow. This includes Underwriting questionnaires and New Business policy delivery requirements.

If something needs your attention, you'll see an alert on the Life New Business page. Just click on the client number and upload!

Underwriting requirements						
Forms search						
Any requirements greater than a year will not display.						
Requirement	Seq	Message/Reason for decision	Status	Date	Designation	
Drug usage questionnaire (DRUGQ) 	001	TEST FILE UPLOAD	Advisor to order/handle	22MAY2018		
Attending Physician's Statement 01 (APS1)	001	Ordered due to medical history	Ordered	23MAR2018		
Blood Profile (BPF)	001		Advisor to order/handle	23MAR2018		

Client name: AROBERTA EDWARDS Client #: 98167849



Underwriting requirements

Drug usage questionnaire (DRUGQ)
TEST FILE UPLOAD

Reply date 22/05/2018 12:10:30 PM Reply by Firstname Lastname

Maximum file size allowed: 5MB

Browse for the file

Delivery requirements						
Forms search						
Policy#: 994001849 - WMV02 (Advisor code)						
Cash with application \$0.00	Print date	Mail date	End of delivery date	Final disposition date 07JAN2018		
Requirement	Seq	Status	Date	Designation		
Cash With Application (CWA)	001	Advisor to order/handle	17OCT2017			
Leave at home Package - Client Authorization Signature Page (WETSG) 	001	Advisor to order/handle	16OCT2017	LP1539		

Client name: LYDIA LLORD Client #: 98166414

Delivery requirements

Do you have questions for our Tech Team? Contact e-business at e-business@ivari.ca or 1-800-646-1481

Reply date 17/05/2018 2:48:10 PM Reply by Firstname Lastname

Leave at home Package - Client Authorization Signature Page (WETSG) Maximum file size allowed: 5MB

Browse for the file

3. Benefit – Even faster turnaround!

Why should you use this feature? Documents uploaded through webcappow go straight to Underwriting and New Business for processing!

Make sure you're registered on ivari.ca to receive these eNotifications

Once you've registered, you can go to your profile and customize your account.

As part of the registration you will automatically receive the notification by email but you can change this to text message or select both options.

4. Looking for questionnaires and paramedicals in the policy contracts?

You might notice that questionnaires, paramedicals and telephone interview documents are no longer printed with the contract. This information is still available upon client request.

Questions?

For technical support 1-800-646-1481

For other questions 1-866-WFG-ROCKS (934-7625) or wfgrocks@ivari.ca