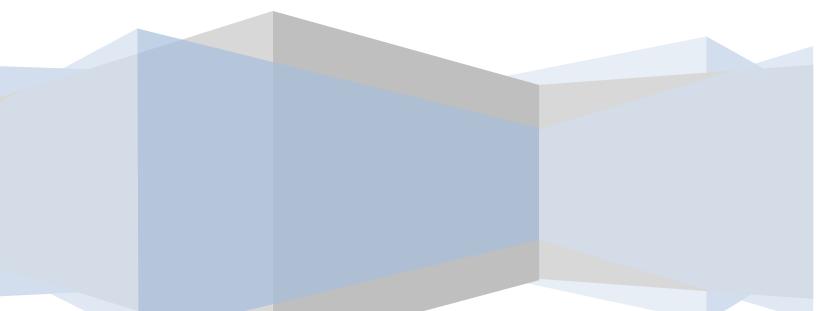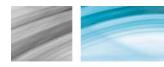**Canada Life**™

MGA implementation toolkit

New service offerings to simplify new business

For more information, contact:

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Phone: (416) 552-5080
Email: Joanne_Campbell@canadalife.com

Contents

Introduction

New Business Now is a package of services designed to make it easier for your organization to do business with Canada Life™. Through a secure internet connection, the advisors and administrators in your office will have self-serve access to:

- New web application for insurance
- View submitted applications being underwritten
- Receive a PDF copy of the application for insurance submitted electronically
- Subscribe to advisor daily and weekly notification messages to help track the progress of an application
- Receive CITS certified electronic data feeds of pending business

Using this document:

This document is intended for individuals responsible for set-up and maintenance of the internet services that your organization uses. It provides details about how to access the **New Business Now** services as well as important information about maintenance and support.

IMPORTANT: Information that may affect how the system will behave for different people in your organization is highlighted with borders like this.

How to connect

New Business Now uses the same security infrastructure that we currently use for Canada Life RepNet™. Anyone who wants to use these services will need to enroll for *RepNet* if they have not done so already. Once enrolled, there are two ways to connect to **New Business Now**. Policy underwriting status information is updated on "real" time basis.

If advisors and administrators in your office already use *RepNet* then they will have access to **New Business Now automatically** using the same login procedure they now use for *RepNet*.

Alternately, you can provide them with a shortcut that connects to **New Business Now** directly.

Canada Life *RepNet* access:

New Business Now can be launched from *RepNet* as follows:

1. Sign-in into *RepNet* using normal security credentials.
   a. Click on the home page link provided to launch **New Business Now** link
   b. Or navigate Home > online services
2. Once you're logged in, you're ready to use **New Business Now**

IMPORTANT: *Individuals who access New Business Now from RepNet will find that the language preference they set in RepNet carries through to New Business Now, even if it's different than the language preferences they have set in New Business Now.*

Direct link:

New Business Now can also be launched directly using a dedicated link, which is:

https://repnet1.canadalife.com/eapp/eapp2

Depending on your preferences, the reference may be stored as a browser bookmark, a desktop shortcut or a link on a web page using the following HTML code:

English:

`<a href="https://repnet1.canadalife.com/eapp/eapp2?language=en">Canada Life - New Business Now</a>`

French:

`<a href="https://repnet1.canadalife.com/eapp/eapp2?language=fr"> Canada Vie - Proposition d'assurance Affaires nouvelles en direct</a>`

Enroll for *RepNet*/New Business Now

- If you do not have access to *RepNet*, please contact your local regional marketing centre or Distribution Methodology and we can provide you with your "Activation Code" so you can register for *RepNet*.
- If you have staff that will need access to **New Business Now** and *RepNet*, they will need to be granted Third Party Access (TPA). To do so, a TPA form signed and dated by an authorized individual should be submitted to Canada Life's Distribution Methodology Department (fax: 1-866-277-2525) or emailed to: distribution_methodology@canadalife.com

  o https://repnet1.canadalife.com/portal/stellent1/groups/iiip/%40iiipggrmcnamgapghosagaoff/documents/content/s1_273961.pdf

New Business Now landing page

Access to **New Business Now** is designed to accommodate office administrators who may support multiple advisors. The landing page shows the *signed-in* user with the list of advisors whose information they can access. In order to view information for a specific advisor, individuals with access to multiple advisors must select an advisor before they can view any detailed information.

New Business Now functionality replaces the current pending case information you find in RAPID. Business that is currently pending will continue to be found using the current pending policy lookup in RAPID.

Pagination and filtering options have been provided in order to help individuals who work on behalf of multiple advisors to manage the amount of information on the screen.

Advisor list pagination

By default, the advisor list displays 10 entries per page. A drop-down selector at the bottom of the page allows a person to change the number of names displayed. Pagination controls for navigating to *first, previous, next* and *last* are available for navigation between pages.

Advisor list filtering

The list of advisors can be filtered by name or by advisor code as shown below:

Filter by *advisor name* displays advisor names that contain the text specified in the filter. Either the full name or part of the name can be used (see example below).

Filter by *advisor code* displays only advisors that match exactly the code specified in the filter. It does not yield a partial match.

Viewing submitted applications

Submitted application search options:

Once an advisor has been selected, **New Business Now** displays the advisor's name in the top right corner of a search page, which provides options for retrieving applications submitted by that advisor. Search can be based on any one of the following terms:

- All
- Insured name
- Owner name
- Company name
- Application ID

Search results

Search results are displayed in a table that lists pending applications that meet the search criteria for the selected advisor. As shown below, additional columns in the table make it easier to identify a particular application for detailed examination.

View pending application

Click on the application ID for a given row in the search results table in order to display details of a single application. Once you are finished with the selected application, click "Back to search" in order to return to the search results table.

Receiving copies of applications submitted online

When an advisor completes a web app, the completed application will be sent directly to Canada Life. If your organization wants to receive electronic copies of insurance applications that have been submitted on-line, we will work with you to set up your subscription. This section outlines the subscription request procedure and configuration options for setting up an FTP site to receive the application documents your advisor has submitted. The documents are created when the application is received by Canada Life on line.

Important: *Any FTP arrangements that you have in place with Canada Life will remain. Some modifications may be necessary in order to take advantage of new services.*

Subscription process

To learn how to request this service, please see the MGA subscription process at the end of this document.

Branch code configuration

Canada Life has set up a flexible process for grouping applications to fit your branch/office (ALPHA code) structures. During the subscription process you will tell us how you want documents to be grouped at the branch code level, which the following chart illustrates as an example.

MGA	Branch/office code	FTP destination
MGA-1	ABCD	Ftps://<dmz-site>/MGA1/Applications/
	AFCD	Ftps://<dmz-site>/MGA1/Applications/
MGA-2	ACCD	Ftps://<dmz-site>/MGA2/111/Applications/
	ACCE	Ftps://<mga2-site>/applications/
MGA-3	ABBD	Ftps://<mga3-site>/apps/
	AFCB	Ftps://<mga3-site>/apps/
	BFCB	Ftps://<dmz-site>/MGA3/apps/
	CFCB	Ftps://<dmz-site>/MGA3/apps/

FTP site setup

Depending on your existing practices, you may want us to push files to your own FTP site or you may want us to pull files from our site. This section gives highlights of the infrastructure requirements for both options.

Push to your FTP site

If you would like us to push files to your site, we will require the following information:

- The site address and subdirectory for each branch/office code subscribing to receive applications (**Note:** A subdirectory specific for applications should be defined)
- Read/write permission to the subdirectory should be allowed
- The site should allow for secure transfer of files (ssl or ssh). A username and password is required in order to setup and access the MGA site (Note: It is recommended the password is non-expiring)
- Sites should have enough capacity to hold the applications (See capacity and purge below)
- A technical person's contact information
- Security questionnaire and our data feed agreement

Pull from our internal secure FTP site

If you want to pull files from our FTP site you will need to send us a request to set up an internal secure FTP site. We will provide you with a request form that sets out:

- Your name
- Your company
- Email address of technical contact
- Optionally, the user ID you would prefer (this will be assigned if it is not currently in use)
- The IP address or IP addresses from which you will connect
- Security questionnaire and our data feed agreement

Safe transport of sensitive files across the Internet between your site and ours is provided through the use of secure sockets encryption and IP address filtering. Once we have notified you that the site has been set up you can verify that your IP address has connectivity by connecting to the site.

Existing FTP secure site access

Any existing FTP arrangements that you have with Canada Life will remain as is. We will work with you to arrange a process for the delivery of copies of the applications, if you desire them.

Capacity and purge

A. **Canada Life site:**
- Canada Life DMZ sites will have enough capacity to hold two weeks of application images
- It should be expected by the MGA that Canada Life sites will be purged every two business weeks

B. MGA site:

- MGA's are expected to provide enough capacity for the automated transfer of applications to proceed. When determining sizing requirements you can use the following assumptions:

Average Application file size (KB):	250

- Clean-up and purging of their documents will be dependent upon the capacity you have allocated to us and your internal site management policies.

Application support and troubleshooting

If problems are encountered when transferring application images to the respective sites, email messages will be sent to our internal application support team via the automated processing application. If needed, the application support team will contact the respective MGA technical contact on record.

For the purpose of preparing for **New Business Now**, if you have questions or experiencing issues, please contact Joanne Campbell as noted on the cover page.

B2B feeds (pending and in-force)

We recognize that most vendors require the MGA to input tombstone information, including policy number into the back office system for a feed to be loaded, otherwise it will be rejected. The purpose of having a copy of the web application available via the FTP site is to allow the MGA to collect the necessary information from the application and enter it into the back office system, thereby accepting the B2B feeds for new web apps.

The following are the changes to expect in the B2B data feeds that Canada Life provides:

- No change to in-force feeds

- Temporary additional Canada Life B2B pending feed during transition. This means you will receive two feeds, the existing feed sourced from the current Canada Life New Business system and a new Canada Life B2B pending feed sourced from New Business Now. The feeds will be named differently which will allow you to distinguish them (the new feed starts with a 'P' and the existing feed starts with a 'T').

- The new Canada Life B2B pending feed is built to the same ACORD 2.16 standard as the existing pending feed.

- The new Canada Life B2B pending feed will now include the CITS ACORD descriptions in the XML.

- The "Requirement Status Reason" will now be included as an optional parameter in new Canada Life B2B pending feed.

- The new Canada Life B2B pending feed will not include telephone number and best time to call information for underwriter and case coordinator roles.

- Some new lookup values in the requirement codes will be provided.

- The assignment of underwriter and case coordinator is not automatic in the underwriting system, therefore the roles may not be on the feed.

- The CWAAMT field now correctly reflects the amount of cash received with the application, on the existing it was the modal premium.

- The final feed produced when the policy status changes to inforce will show the Acknowledgement of Policy Received (AOPR) as outstanding if it has not been received when the policy is placed. It will be shown as outstanding on the pending application inquiry and weekly emails until it is received. It will trigger a daily email when received and will no longer show as outstanding on the weekly email. In those cases, the receipt of the AOPR will not trigger a B2B feed.

Daily and weekly communications

This section highlights new daily and weekly communications that will be provided as part of the **New Business Now** services, regardless if the application was submitted via the web app or paper app. Advisors and their delegates need to subscribe to this service in order to receive these communications.

Information contained in the advisor daily email communications will appear in the daily B2B feeds.

Daily

- Daily email will show key updates to tasks, action(s) required and underwriting information when a policy is being issued.

- Ratings and adverse decisions will be handled by a separate email.

- Daily email creation starts at 7 p.m. ET and will run daily Monday to Friday. Any activity that occurs on the weekend will be sent out on Monday.

- Advisor subscription will be done online in web app via the advisor notification preferences. To learn how, see the advisor subscription process below.

- Advisors can choose if they would like a specific email address to receive daily updates for a particular application by providing the email address on the advisor report.

Sample messages:

This is a system generated email as of 7 p.m. ET, on behalf of Canada Life and **<MGA name>**.
Do not reply. For application details, please visit the New Business Now website.

Insured: Insured name
App #42011176-2
Policy # E405844T

Update
Policy will be issued standard non-smoker

This is a system generated email as of 7 p.m. ET, on behalf of Canada Life and **<MGA name>**.
Do not reply. For application details, please visit the New Business Now website.

Insured: Insured name
App #42011176-2
Policy # E405844T

Update
APS KF (Doctor) received and under review

- The weekly email will provide information on your pending submitted policies; the information will include all outstanding requirements.

- For policies that are issued, you will see the outstanding placing requirements.

- The weekly email creation will start at 5 p.m. ET time every Saturday.

- Advisor subscription will be done online in web app via the advisor notification preferences. To learn how, see the advisor subscription process below.

- Advisors can choose if they would like a specific email address to receive weekly updates for a particular application by providing the email address on the advisor report.

- MGA office subscription is attached when the application is created, whereas advisor subscription is based upon the preferences when the weekly communication is generated.

Sample message:

This is a system generated email as of 23 November, 2013 at 5 p.m. ET, on behalf of Canada Life and <MGA Name>. Do not reply. For application details, please visit the New Business Now website.

Pending application(s)

App #: 12345678
Policy #: 54677778
Insured: Josephine Cowan

Order/Request date	Outstanding requirements
10 December 2012	LIRD
10 December 2012	Inspection Report HH
12 December 2012	Incorrect information - driver's lic #

Issued policy(ies)

App #: 12345666
Policy #: 5467772
Insured: Murray Haist

Request date	Outstanding requirements
8 January 2013	Acknowledgement of policy received (AOPR)
8 January 2013	Amendment(s) within AOPR

Pre-launch advisor subscription process for daily and weekly emails

In order to take immediate advantage of the improved communications regarding business that has been submitted, regardless if the application was submitted via the web app or paper, Canada Life advisors and their delegates can subscribe to:

- Daily communications
- Weekly communications

Canada Life *RepNet*

Home	Products & tools	Rates & values	Forms & procedures	Online services	Contact us	Advisor support

Advisor notification preferences for insurance application

Complete this form to receive daily and /or weekly updates. You must sign in to RepNet site as the servicing advisor.

Input the servicing advisor information.   * Required field

Notification Language   ⦿ English ○ French

Phone number   [_____] *

Servicing advisor primary advisor/commission ID   [_____] *

You may add multiple advisor/commission IDs below

[_____] [_____] [_____]

Enter email address and select notifications   **Enter recipient's email address**

1. First enter the servicing advisor's email address   Email address   [_____] *

2. Choose which notifications to receive

3. Select, Add to summary   Confirm email address   [_____] *

4. Repeat for additional recipients

5. To delete information, select the row in the summary below and   Receive Notifications(select all that apply):*
select, Delete
                                                           ☐ Daily action items
6. After you've entered all recipients, then select Submit
                                                           ☐ Weekly status summary

                                                           ☐ None

                                                           [Add to summary]

Summary

Email address	Receive Notifications	Delete

Include all recipients before submitting. Complete the form again if additional recipients need to be added.   [Submit]

MGA subscription process

MGA's can subscribe to some or all of the following services:

- Daily communications
- Weekly communications

MGA's can request to receive copies of the daily and or weekly communications sent to advisors on their pending business with your office. The emails received will be a copy of the communications sent to the advisor and will be sent to you bundled by advisor for pending business (web app and paper app).

If you wish to subscribe to our daily or weekly communications, please complete the communication preference registration form and return it to Joanne Campbell at joanne_campbell@canadalife.com. You may wish to set up these email preference with generic email address, to reduce the need to communicate staffing changes with Canada Life: For example, Newbus@ABCfinancal.ca versus joan.smith@ABCfinancial.ca

- Receiving copies of applications submitted online

MGA's may elect to receive copies of web apps submitted by your advisors. Copies of electronic applications will be delivered on nightly basis, Monday to Friday. Any applications submitted on the weekends will be delivered as they are received.

PDF copies of the applications can either be sent to your office via FTP on either a "push or pull" basis.

If you wish to receive copies of electronic applications submitted by your advisor, please complete the communication preference registration form and email it to joanne_campbell@canadalife.com. Upon receipt of this document, we will work with you to facilitate the delivery of copies of applications.

MGA implementation checklist

The following are key items to address, if applicable, to ensure you're ready for **New Business Now**:

- ✓ Ensure all your advisors have *RepNet* access set up before our launch date

- ✓ Set up a deep link to New Business Now on your website (optional)

- ✓ Set up an FTP site to receive your copies of web apps (select "push" or "pull")

  - ✓ And, establish electronic storage for these applications

- ✓ Business process changes with web apps:

  - ✓ Review/update your process for review of incoming applications (re: compliance/licensing, etc)

  - ✓ Evidence ordering for advisors (when required)

- ✓ Subscribe to receive copies of daily and/or weekly emails

- ✓ Prepare for updated B2B feeds

Thank you for choosing Canada Life. We value your business.