

Requirement Management – Insurance Transactions (Amendments)


April 2020




INVESTED IN YOU.

Requirement Management – Amendment

Before March 17th – Communication process



- **Agent** received amendments with the paper version of the contracts, validate the information and has the client sign the amendments.

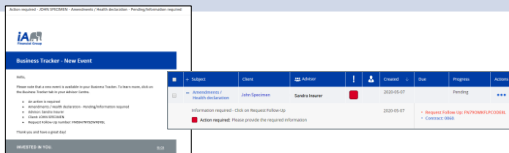
2

Requirement Management – Amendment

New communication process

Starting May 11, 2020

- **Advisor** informed by the Business Tracker of the **missing information** still needed to process the insurance transaction.
- Notification sent to the advisor based on their notification preferences. **This notification replaces the email to the agency.**



3

New Communication Process



Efficiency

- No more manual email forwarding
- No more forms lookup in the document center
- Facilitated processing and shortened processing delay



Complete overview in Business Tracker

- Everything in one place: No need to search through multiple emails.
- Easy status filtering (Ex.: In process, Pending, Completed, etc.)
- See the "Required" and "Provided" information at a glance



Confidentiality

- Secure way to transmit information



4

Requirement Management – Amendment



Business Tracker - New Event

Hello,

Please note that a new event is available in your Business Tracker. To learn more, click on the Business Tracker tab in your Advisor Center.

- An action is required
- Amendments / Health declaration - Pending/Information required
- Advisor: Sandra Insurer
- Client: JOHN BRICKMEN
- Request Follow-Up number: FM09CNV2WF898L

Thank you and have a great day!

INVESTED IN YOU.

SLC8

Notification sent to the advisor based on his/her notification preferences.

Subject:
Action required – Client name – Transaction type and status

Consult the Business Tracker to see and send the missing information

5

Requirement Management – Amendment



In Business Tracker

Subject	Client	Advisor	Created	Due	Progress	Actions
Amendments / Health Declaration	John Spectators	Sandra Insurer	2020-05-07		Pending	<ul style="list-style-type: none"> Information required: Click on Request Follow-Up Action required: Please provide the required information Request Follow-Up: FM790885FC008L Continue: 3046

See the completed steps, from receipt to the processing of the transaction

Click on **Request Follow-Up** to see and send the missing information

6

Sign the documents with your client!
Preferred solution: OneSpan

10

Requirement management – Amendment
Electronic signature process with your client!



➤ Add the amendments and the confirmation of issue to the transaction in OneSpan

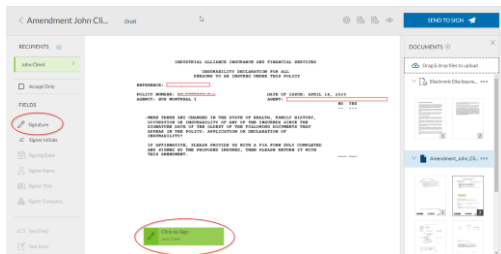


11

Requirement management – Amendment
Electronic signature process with your client!



➤ Add a signature field



12
