FREQUENTLY ASKED QUESTIONS

ABOUT THE PENDING BUSINESS APPLICATION AND COMMUNICATIONS PROFILES

PENDING BUSINESS APPLICATION

Q. Is training available to learn how to use the Pending Business application?

A. Yes. **Online training** is available on Webi: Reps Services > Technology > Webi's Application.

Q. What are the benefits of the Pending Business application?

A. This tool allows you to:

- view the status of all your pending business files in real-time, on one page
- receive notification of outstanding requirements by email and in the application
- respond to outstanding requirements and attach files such as illustrations and forms directly in the application. This allows all communications to be saved in one place.

Q. How often should I check the Pending Business application?

A. Outstanding requirements are updated regularly in the system, therefore we recommend developing the habit of checking a minimum of once per day.

PENDING BUSINESS APPLICATION

Q. What about files that were already pending on September 15, 2014?

A.

- For files submitted to the Underwriting Department **BEFORE September 15:**

  Please follow the usual process of checking the Pending Business Report on Webi.

  Outstanding requirements, decisions and responses to requirements will continue to be communicated via email.

  These files will **not** be found in the new Pending Business application unless an outstanding requirement is requested. In that case, the file status will say "Received" and the outstanding requirement will be displayed in the new application.

- For files submitted to the Underwriting Department or received by the New Business and Contractual Changes Department **from September 15 onward:**

  The file will be tracked through the new Pending business application.

  You will receive e-mail notifications if there is an outstanding requirement and you must enter your response directly into the application.
  Any additional information about a file must be recorded in the "Special Notes" tab of the application.

Q. Who can I contact in case I have questions or problems with the application?

A.

- For general questions about the application, please contact Customer Service, Insurance at 1-800-278-0669 or csin@dfs.ca.

- If you experience **technical difficulties**, contact Merchandising Technology at 1-800-461-3914 or mtsupport@dfs.ca for assistance.

COMMUNICATIONS PROFILES

Q. What exactly is the "Communications Profiles" link on Webi?

A. "Communications Profiles" allows you to choose how you want to receive communications to track pending business. The preferences you choose will also be used for other tools that will be implemented in the coming months.

Q. Why is it so important to validate the accuracy of the information in the "Communications Profiles"?

A. This is the **only way** to ensure that you receive important communications regarding your clients' applications. It is therefore essential to ensure that the email address listed is **valid**.

Q. What is the default email address?

A. The email address that appears by default is that of your financial centre. If you are an independent advisor please pay close attention to verifying this address.

Q. If the default email address is that of a Financial Centre, can an advisor be copied on the communications received from the Pending Business application?

A. Yes. An advisor or an assistant can add another email address to receive a copy of the communications (CC).