

## E-Delivery: A step by step guide

### For E-Application and paper applications

E-Delivery is the electronic delivery of New Business insurance contracts and applies to paper and electronically submitted applications. When those applications meet the E-Delivery eligibility rules, the contracts will automatically be sent by email (not paper) to each owner and insured(s) to obtain electronic signatures.



# 1.

#### Ensure consent is provided within the E-application or paper application

All owners and insureds must provide an email address and cell phone number to authenticate themselves.

For paper applications, review the [E-Delivery job aid](#) (found in the Insurance Training Corner on Advisor Portal). This will outline the consent sections which must be completed within the E-Application.

# 2.

#### You will receive New Business Notifications (NBN).

- An NBN to confirm your client's policy contract has been approved for E-Delivery.
- Followed by another NBN that includes your copy of the documents. The contract will be sent to your client 24 hours after the first NBN has been sent to you.



# 3.

#### Schedule a meeting with your client to review the contract and delivery documentation.

Video conferencing such as face time, skype, zoom, and phone are acceptable.

# 4.

#### A link to the policy contract is sent via email and an authentication code is sent to each individual's cell phone number.

This authentication code is unique to each individual and is required to access the documentation. Without a mobile number, clients cannot take advantage of E-Delivery.



# 5.

#### The client will have 30 days from the email date to review and sign the contract.

After 30 days, the link to the electronic contract will expire and the client will no longer be able to open the contract or any related documents. If the client wants to proceed after this time, please contact Manulife.

# 6.

#### Client(s) complete the electronic signature process.

- Clients must sign in Canada.
- You must be licensed in the province where the client resides.
- The client must download and save this contract. This will be the only contract copy that will be sent.

