

DELEGATION
TOOL
Guide



Table of Content

Delegation Tool	3
Definitions	3
Using the Delegation tool.....	3
Accessing the application	3
View delegations	5
Add a user (delegate)	5
Create a delegation for a new delegate	7
Create a delegation for an already existing delegate.....	9
Modify an existing delegation	11
Delete a delegation	13
Edit a delegate's profile information.....	14
Generate a temporary password for a delegate	15
Delete a delegate.....	16
Manage another user's delegations.....	17

Delegation Tool

Delegation

The delegation tool allows you to delegate some or all your access rights to the tools and applications of the Advisor Centre. If the delegated person is not recognized by our systems, the tool also generates a username and password for the new user.

Definitions

Delegator: Person who grants their Advisor Centre access to someone else

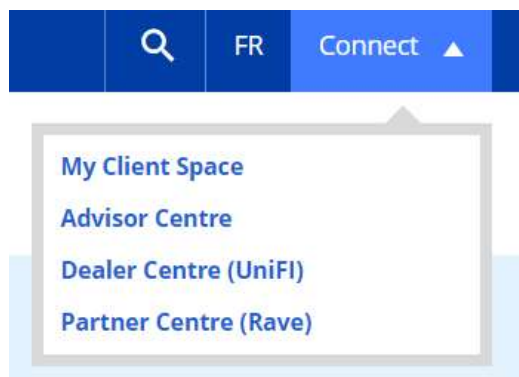
Delegate: Person who will be granted access to someone else's Advisor Centre

Delegation: Process by which someone will be able to access the delegator's Advisor Centre

Using the Delegation tool

Accessing the application

1. Go to **ia.ca**, click on **Connect**, and choose **Advisor Centre**.



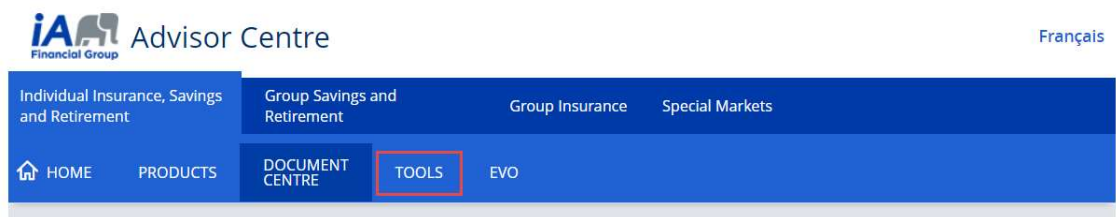
2. Select your line of business.



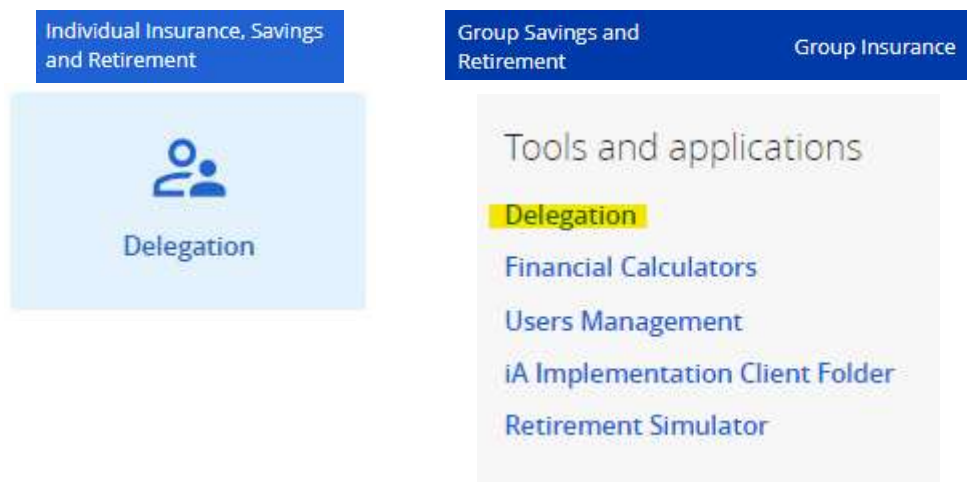
3. Sign into your account.

The diagram illustrates the login process. On the left, a blue box titled "Secure access" contains two buttons: "Sign in" (yellow) and "Register" (white with a blue border). A blue arrow points to the right, leading to the "ADVISOR CENTRE" login page. This page features a header with the title "ADVISOR CENTRE". Below the header, an information icon (i) is followed by a message: "The visual changes we have made in no way affect your online experience. Sign in using your regular username and password." The login form includes a "Username" label and a text input field, a checkbox for "Remember the username", a blue "Next" button, a link for "Forgot username?", and a "Create account" button at the bottom.

4. For the **Individual Insurance, Savings and Retirement** sector, click on **Tools**. For **Group Insurance or Group Savings and Retirement**, go directly to step 5.



5. Click on **Delegation**.



View delegations

When you log in to the delegation tool, you will get the welcome screen, which will display the list of all the users for whom you can complete a delegation or those to whom you have already delegated your rights.

You can filter the list of users according to:

- a. Users for whom you have already completed a delegation
- b. Name
- c. Username
- d. Registrant
- e. Agent code (if the user is an agent)

The screenshot shows the 'Delegation' tool interface. At the top, there is a header bar with 'Delegation' on the left and 'Français' on the right. Below this is a dark blue bar with 'User Guide ?' on the right. The main content area is titled 'Users'. Under 'Users', there is a section for 'Agencies' with a dropdown menu set to 'All'. Below that is a 'Search' section with a checkbox labeled 'Only users for whom I have created a delegation'. Under the checkbox are four input fields: 'Name', 'Username', 'Registrant', and 'Agent code'. Below the search fields is a table with four columns: 'Name', 'Username', 'Registrant', and 'Agent code'. The table has five rows. The first row contains the values 'XYZ', 'abcd', and '12345'. The second row is empty. The third row is empty. The fourth row is empty. The fifth row is empty. At the bottom left of the table area is a blue button labeled 'Add a user'.

Name	Username	Registrant	Agent code
XYZ	abcd		12345

Add a user (delegate)

If the person for whom you want to complete a delegation is not in the list of active delegations, there are two options for adding the user.

1. Click on **Add a user**.



2. Enter the information relating to the new user (first name, last name, language, email address and name of the agency).

Add a new user

Delegation management for

First name	Last name
<input type="text" value="New"/>	<input type="text" value="User"/>
Language	
<input type="radio"/> French	
<input checked="" type="radio"/> English	
Email	
<input type="text" value="new@user.la"/>	
This user can receive delegations from members of what agency?	
<input type="text"/>	

3. Select the delegation rights (this option allows the delegate to delegate rights to another person, not only the rights you have delegated to them, but all your rights).

Delegation rights ⓘ

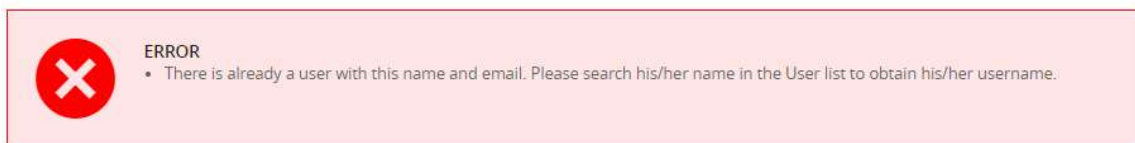
Do you allow this user to delegate some or all of your rights to another user?

- ☒ No
☐ Yes

4. Click on Next.



If an error message is displayed indicating that the delegate exists, return to the user search page to find the user in question.



Note: Career Advisors (Federated) will not have this option. To be able to add a user, you will need to contact the Help Centre.

IT Help Desk

User services: 1-888-610-5101

Create a delegation for a new delegate

After the user is created, you can create a new delegation for the user directly.

1. Enter the user details.
2. Select the information for the **Individual Insurance, Savings and Retirement** sector (if applicable).
 - a. Scope of the hierarchy (agent codes to which the delegate can have access)

Scope of delegation

- ☒ No Data
☐ All my data

- b. **Individual Insurance, Savings and Retirement** sector applications

3. Select the information for the **Group Savings and Retirement** sector (if applicable).
 - a. Contracts

Contracts

☐ Select all

- | | |
|--------------------------|-------------------|
| <input type="checkbox"/> | BEST COMPUTERS |
| <input type="checkbox"/> | BLUE WORKERS |
| <input type="checkbox"/> | HEAVY HIGH-SCHOOL |
| <input type="checkbox"/> | RED SERVICES |

- b. Applications in the **Group Savings and Retirement** sector.

4. Select the information for the **Group Insurance** sector (if applicable).
 - a. Policies

Policies

☐ Select all

- | | |
|--------------------------|-------|
| <input type="checkbox"/> | 00000 |
| <input type="checkbox"/> | 00000 |
| <input type="checkbox"/> | 00000 |

- b. Applications in the **Group Insurance** sector

5. Select the level of access to compensation information.

Do you want to give this user access to your compensation information?

☒ No

☐ Yes

6. Accept the terms of use.

☒ I accept the terms of use

[Previous](#) [Next](#) [Cancel](#)

7. Confirmation screen.

The confirmation screen that appears after creating a new delegate and a new delegation for them displays the following information:


- a. Username of the delegate
- b. Temporary password for the delegate

Delegation Français

User Guide ?

Confirmation

Delegation management for



The delegation was successfully created! The accesses selected have been successfully delegated. The user can now connect to the Advisor Centre by using the authentication information indicated below. An email containing this information has also been sent to the user.

Username
RGEA@GDZ.FDA

Password
xKhGOSd5j8

[Finish](#)

Create a delegation for an already existing delegate

1. On the home page of the delegation tool, select the user for whom you want to complete a delegation.

The screenshot shows the 'Delegation management' interface. At the top, there is a header with 'Delegation' on the left and 'Français' on the right. Below the header is a blue bar with 'User Guide ?'. The main content area has a tab labeled 'XYZ'. Below the tab is a user profile card with a placeholder icon for a person. The card contains the following information: 'Created by' (with a dropdown arrow), 'Email', 'Created on' (28-05-2018), 'Access to delegation' (No), and 'Agency'. Below the card is a section titled 'Delegations' with a blue button labeled 'Create a delegation'. At the bottom, there are two buttons: 'Return' and 'Show all delegations created for this user'.

2. Click on Create a delegation.

Delegations

Create a delegation

3. Enter the delegation details.
4. Select the information for the **Individual Insurance, Savings and Retirement** sector (if applicable).
 - a. The scope of the hierarchy (agent codes to which the delegate can have access)

Scope of delegation

- ☒ No Data
☐ All my data

- b. **Individual Insurance, Savings and Retirement** sector applications

5. Select the information for the **Group Savings and Retirement** sector (if applicable).
- a. Contracts

Contracts

☐ Select all

<input type="checkbox"/>	BEST COMPUTERS
<input type="checkbox"/>	BLUE WORKERS
<input type="checkbox"/>	HEAVY HIGH-SCHOOL
<input type="checkbox"/>	RED SERVICES

- b. Applications in the **Group Savings and Retirement** sector

6. Select the information for the **Group Insurance** sector (if applicable).
- a. Policies

Policies

☐ Select all

<input type="checkbox"/>	00000
<input type="checkbox"/>	00000
<input type="checkbox"/>	00000

- b. Applications in the **Group Insurance** sector

7. Select the level of access to compensation information.

Do you want to give this user access to your compensation information?

☒ No
☐ Yes

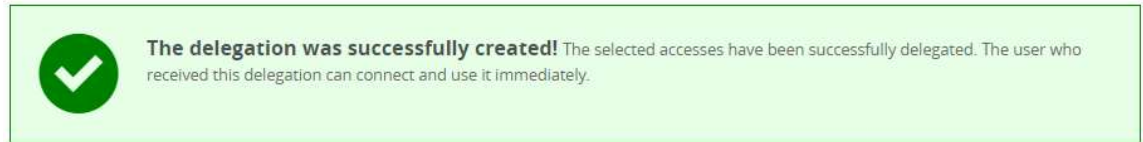
8. Accept the terms of use.

☒ I accept the terms of use

Previous **Next** Cancel

9. Confirmation screen.

The confirmation screen that appears after creating a new delegation for an existing user displays the following information:



Modify an existing delegation

1. On the home page of the delegation tool, select the user for whom you want to modify an existing delegation.

Delegation Français

User Guide ?

Users

Agencies
All

Search


☐ Only users for whom I have created a delegation

y Username Registrant Agent code

Name	Username	Registrant	Agent code

Add a user

2. Select the pencil button to edit delegation details.



Created by

Email



Created on

29-06-2023



Access to delegation

No

Agency



Delegations

Description	Delegated on	Delegated by	Actions
Delegation	31 07 2023		 

Add another delegation

It is possible to add a new delegation for this user. This option can be useful if you want to create a different type of access which is not possible through one delegation. [Create a new delegation.](#) >

Return

Show all delegations created for this user

3. Select the delegation details.

Details of the delegation

Delegation description (optional)

Individual Insurance, Savings and Retirement

Scope of delegation

☐ No Data

☒ All my data

Applications and tools

The following applications are available by default to all users: Illustration tool - FORLIFE Series, Illustration tool - RESP, Premium Calculator, Financial Calculators.

☒ Select all

☒ New Issue - Individual Savings and Retirement

☒ RESP New issue - Individual Savings and Retirement

☒ Incomplete Transactions

☒ Transaction Follow-up

☒ My clients and Business tracker

☒ Download of in-force contracts WITHOUT notification (including contract search)

☒ Download of in-force contracts WITH notification (including contract search)

☒ AGO - Illustrations

☒ AGO - Illustrations and Applications (no e-signature/submission)

☒ AGO - My business

Do you want to give this user access to your compensation information?

☒ No

☐ Yes

4. Accept the terms of use.

☒ I accept the terms of use

[Previous](#) [Next](#) [Cancel](#)

5. Confirmation screen

The confirmation screen that appears after modifying a delegation for an existing user displays the following information:




The delegation was successfully modified! The selected accesses have been successfully delegated. The user who received this delegation can connect and use it immediately.

[Finish](#)

Delete a delegation

1. On the delegation home page, select the user for whom you want to delete a delegation.



Created by

Access to delegation



No

Email



Agency

Created on

29-06-2023



Delegations

Description	Delegated on	Delegated by	Actions
Delegation	31-07-2023		 

Add another delegation

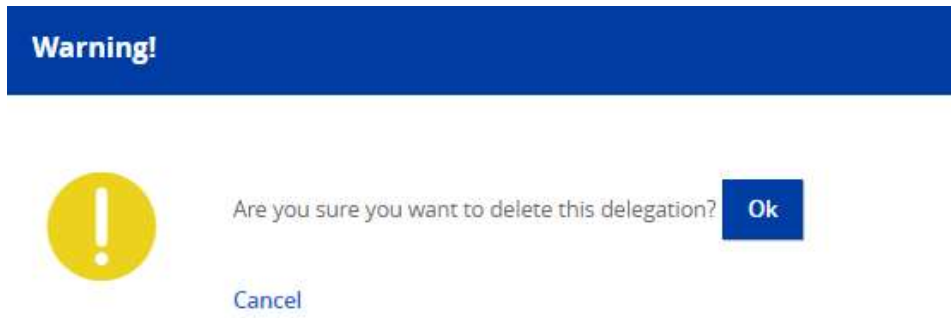
It is possible to add a new delegation for this user. This option can be useful if you want to create a different type of access which is not possible through one delegation. [Create a new delegation.](#) >

[Return](#) [Show all delegations created for this user](#)

2. Press the X button to delete the delegation.



3. Confirm your choice.

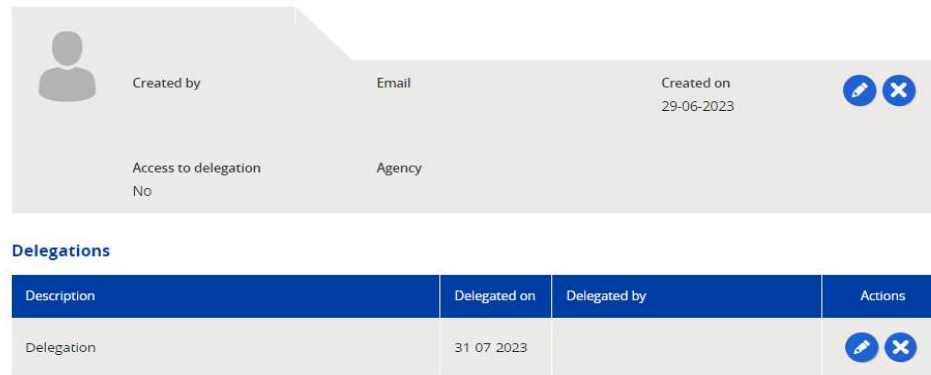


Edit a delegate's profile information



1. On the home page of the delegation tool, select the user for whom you want to modify an existing delegation.

The screenshot shows the 'Delegation' tool interface. At the top, there's a header with 'Delegation' on the left and 'Français' on the right. Below this is a blue bar with 'User Guide ?'. The main content area is titled 'Users'. It features a dropdown menu for 'Agencies' with 'All' selected. Below that is a 'Search' section with a checkbox labeled 'Only users for whom I have created a delegation' (unchecked). There are four input fields: 'y' (with a dropdown arrow), 'Username', 'Registrant', and 'Agent code'. Below these fields is a table with four columns: 'Name', 'Username', 'Registrant', and 'Agent code'. The table has one row with placeholder text. At the bottom left, there is a blue button labeled 'Add a user'.

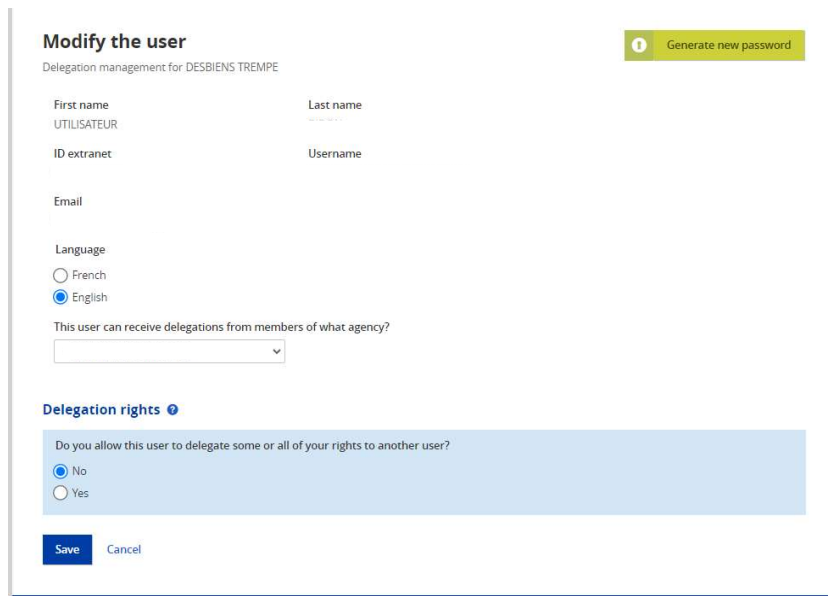
2. Press the pencil button to edit the user profile information.



The image shows a user profile card and a table of delegations. The profile card has a grey header with a user icon, followed by fields for 'Created by', 'Email', and 'Created on' (29-06-2023). Below these are 'Access to delegation' (No) and 'Agency'. To the right of the card are two blue circular icons: a pencil (edit) and a close (X) button. Below the card is a section titled 'Delegations' with a table.

Description	Delegated on	Delegated by	Actions
Delegation	31 07 2023		 

3. The user's profile displays several read-only fields, but allows editing of the following fields:
 - a. Correspondence language
 - b. Agency (if applicable)
 - c. Delegation rights

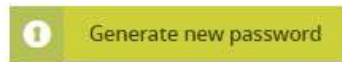


The image shows a 'Modify the user' form. At the top right is a yellow button labeled 'Generate new password'. The form contains several input fields: 'First name' (UTILISATEUR), 'Last name' (empty), 'ID extranet', 'Username' (empty), and 'Email' (empty). Below these is a 'Language' section with radio buttons for 'French' and 'English' (selected). A dropdown menu is labeled 'This user can receive delegations from members of what agency?'. Below that is a 'Delegation rights' section with a question 'Do you allow this user to delegate some or all of your rights to another user?' and radio buttons for 'No' (selected) and 'Yes'. At the bottom are 'Save' and 'Cancel' buttons.

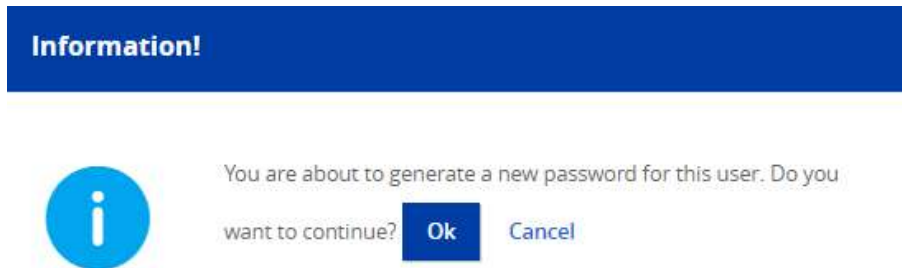
Generate a temporary password for a delegate

This option is used to generate a temporary password for a delegated user. A random password is generated and assigned to the account. This password is displayed on the screen.

1. In the user's profile, click on the Generate a new password button.



2. Confirm your choice.



3. A temporary password is then displayed on the screen.




Delete a delegate

1. On the home page of the delegation tool, select the user for whom you want to modify an existing delegation.

The interface shows a header with "Delegation" and "Français". Below is a blue bar with "User Guide" and a question mark icon. The main section is titled "Users". It includes a dropdown for "Agencies" set to "All". A "Search" section has a checkbox "Only users for whom I have created a delegation" and four input fields: "Name", "Username", "Registrant", and "Agent code". Below is a table with 4 columns: "Name", "Username", "Registrant", and "Agent code". The first row has values "XYZ", "abc", and "12345". The last row has an "Add a user" button.

Name	Username	Registrant	Agent code
XYZ	abc		12345

2. Press the X button to delete the user.



Created by

Email



Created on

29-06-2023



Access to delegation

No

Agency



Delegations

Description	Delegated on	Delegated by	Actions
Delegation	31-07-2023		 

Manage another user's delegations

Note that the following options are only available to administrative users (internal employees or registered via delegation) or a support employee (SuperUser).

The *Manage delegations* page is displayed as soon as the delegation tool is opened if you have those access rights. This page allows you to choose for which agent you want to manage the delegations. You will only see users for whom you can act based on your roles. You can filter the list of users by the following criteria:

- Name
- Username
- Agent code (if the user is an agent)

Depending on your rights, you can then

- View the details of a delegator's delegations (only for SuperUser support employees)
- View the profile information of delegates and delegators
- Modify active delegations
- Delete active delegations
- Edit user profile information
- Generate a temporary password for a user

See previous sections for more details on these actions.



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MKG(2023-08)