



DELEGATION TOOL

Guide



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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

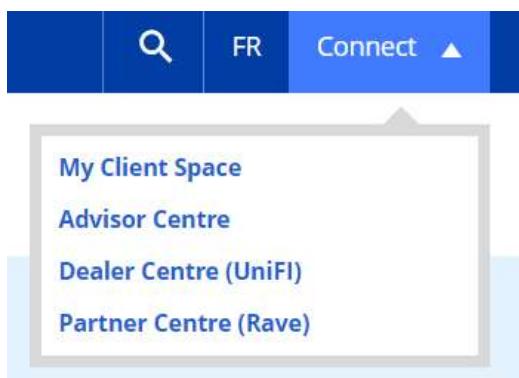
Delegate: Person who will be granted access to someone else's Advisor Centre

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

Using the Delegation tool

Accessing the application

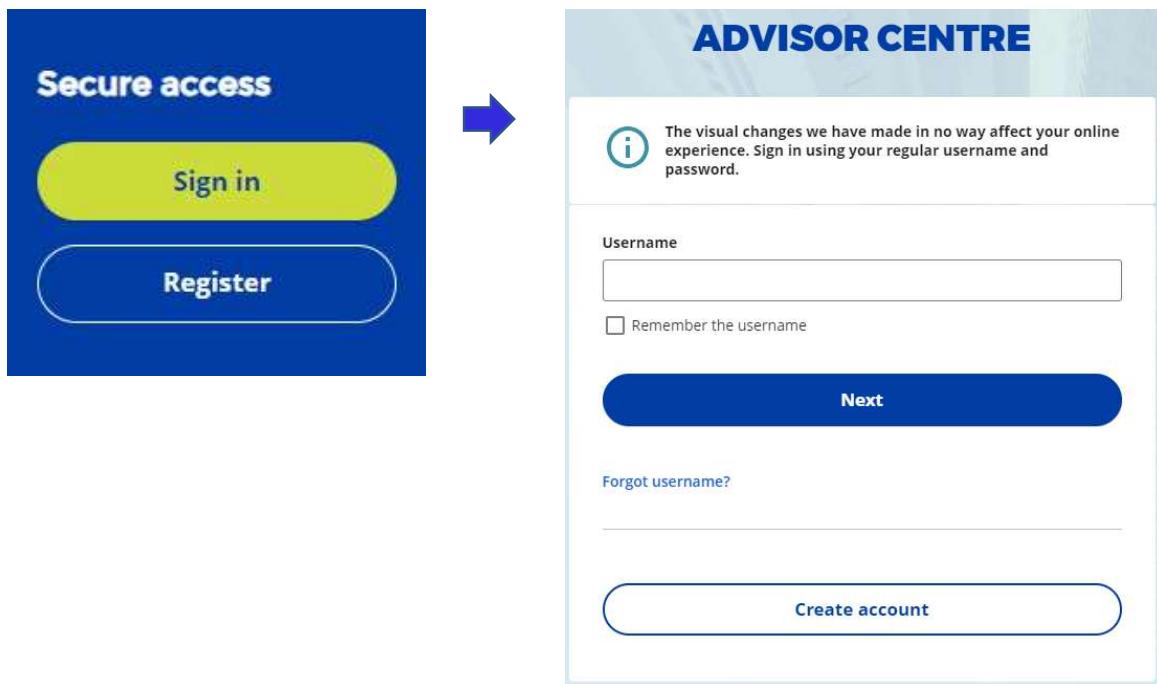
1. Go to **ia.ca**, click on **Connect**, and choose **Advisor Centre**.



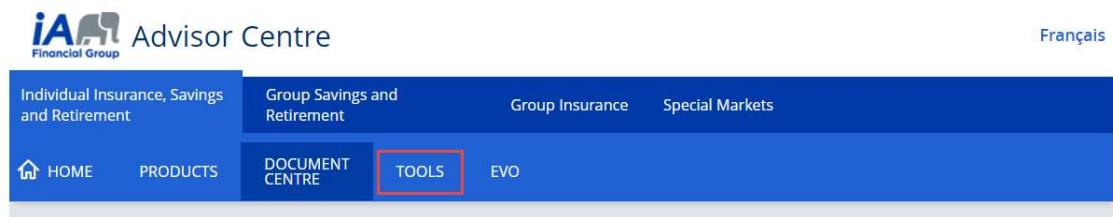
2. Select your line of business.



3. Sign into your account.



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.



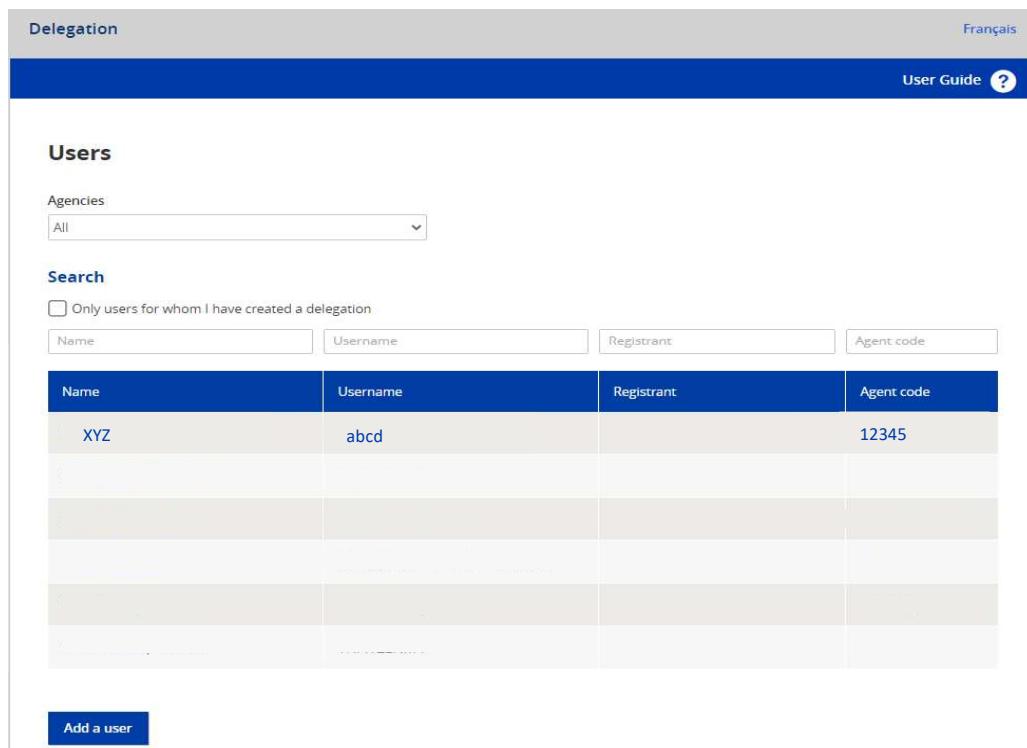
5. Click on **Delegation**.

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)



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**.

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.ia"/>	
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.

Next

[Cancel](#)

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



ERROR

- There is already a user with this name and email. Please search his/her name in the User list to obtain his/her username.

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

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

Contracts

Select all

▶ BEST COMPUTERS

▶ BLUE WORKERS

▶ HEAVY HIGH-SCHOOL

▶ RED SERVICES

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

Policies

Select all

▶ 00000

▶ 00000

▶ 00000

5. 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](#)

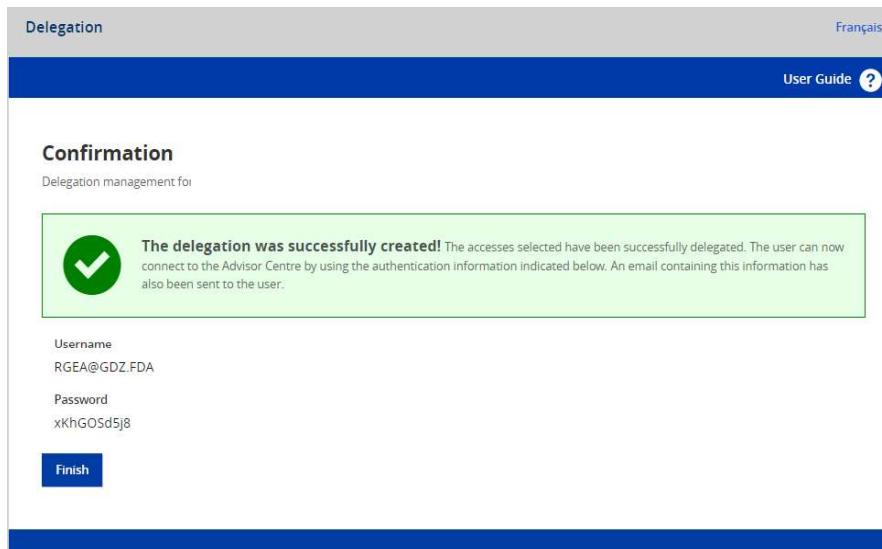
[Next](#)

[Cancel](#)

7. Confirmation screen.

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

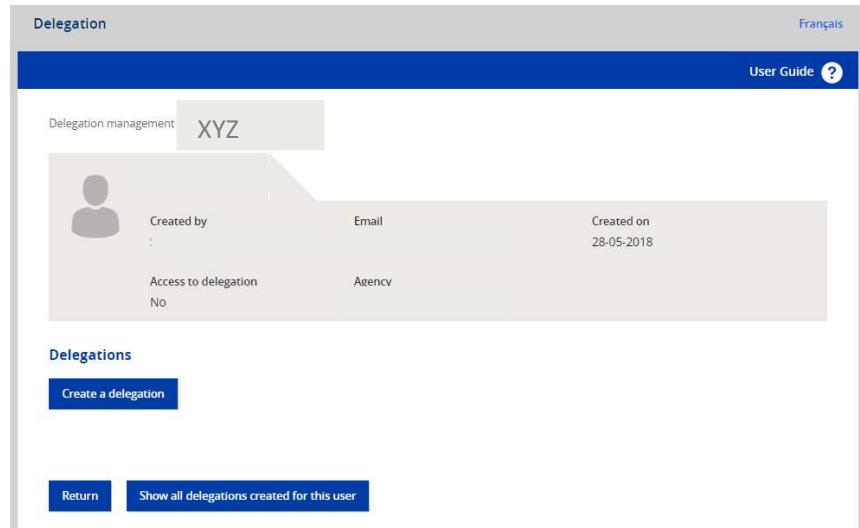
- Username of the delegate
- Temporary password for the delegate



The screenshot shows a confirmation message in a green box: "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." Below this message, the user's credentials are listed: Username RGEA@GDZ.FDA and Password xKhGOSd5j8. A "Finish" button is at the bottom.

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.



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).

- Contracts

Contracts

Select all

- ▶ BEST COMPUTERS
- ▶ BLUE WORKERS
- ▶ HEAVY HIGH-SCHOOL
- ▶ RED SERVICES

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

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

- Policies

Policies

Select all

- ▶ 00000
- ▶ 00000
- ▶ 00000

- 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.

A screenshot of a web-based delegation tool. The top navigation bar includes "Delegation", "Français", and "User Guide". The main content area is titled "Users". It features a "Search" section with a dropdown for "Agencies" set to "All" and a checkbox for "Only users for whom I have created a delegation". Below the search is a table with four columns: "Name", "Username", "Registrant", and "Agent code". The table has one row with empty cells. At the bottom of the page is a blue "Add a user" button.

2. Select the pencil button to edit delegation details.



Created by Email Created on 29-06-2023  

Access to delegation Agency
No

Delegations

Description	Delegated on	Delegated by	Actions
Delegation	31 07 2023	<input type="text"/>	 

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/submit)
 AGO - My business

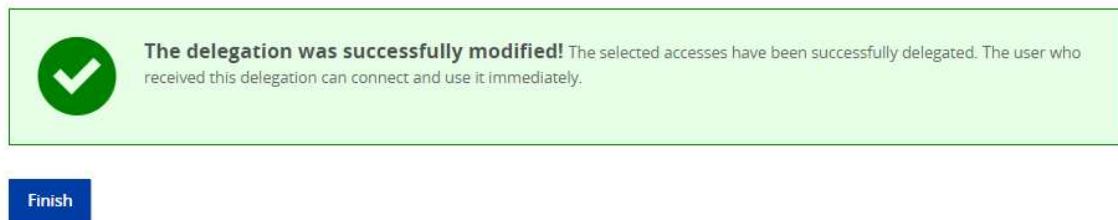
Do you want to give this user access to your compensation information?
 No Yes

4. Accept the terms of use.



5. Confirmation screen

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



Delete a delegation

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

A screenshot of the delegation home page. It shows a user profile with a placeholder icon. Below the profile are details: 'Created by' (empty), 'Email' (empty), 'Created on' (29-06-2023), and edit/delete icons. Under 'Access to delegation' is 'No'. The 'Delegations' section shows a table with one row: 'Delegation' (Description), '31-07-2023' (Delegated on), 'Delegated by' (empty), and edit/delete icons. At the bottom are buttons for 'Add another delegation' and 'Show all delegations created for this user'.

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.

A screenshot of the 'Delegation' tool's user interface. The top navigation bar includes 'Delegation', 'Français', and a 'User Guide' link. The main content area is titled 'Users' and features a 'Search' section with fields for 'Only users for whom I have created a delegation', 'Y' (in a dropdown), 'Username', 'Registrant', and 'Agent code'. Below the search is a table with columns 'Name', 'Username', 'Registrant', and 'Agent code'. A single row is visible in the table. At the bottom of the page is a blue 'Add a user' button.

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

The screenshot shows a user profile page with the following details:

- Profile Information:**
 - Created by: [Placeholder]
 - Email: [Placeholder]
 - Created on: 29-06-2023
 - Access to delegation: No
 - Agency: [Placeholder]
- Delegations:**

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:
 - Correspondence language
 - Agency (if applicable)
 - Delegation rights

The 'Modify the user' dialog box contains the following fields:

- Personal Information:** First name, Last name, ID extranet, Username, Email.
- Language:** French (radio button) is selected, English is also an option.
- Delegation:** A dropdown menu for selecting an agency to receive delegations.
- Delegation rights:**

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

No
 Yes
- Buttons:** Save, Cancel.

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.

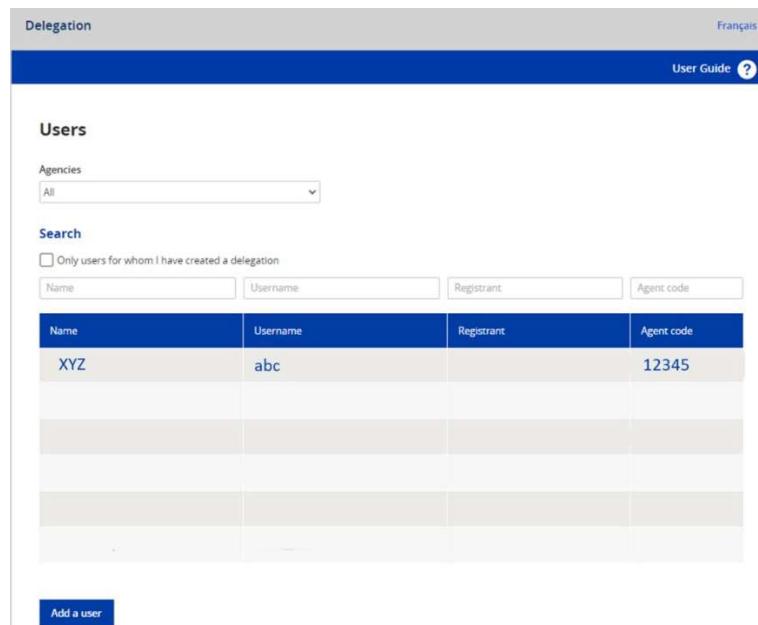


3. A temporary password is then displayed on the screen.

 New password : aJyACvMP4q
Please transmit this information to :

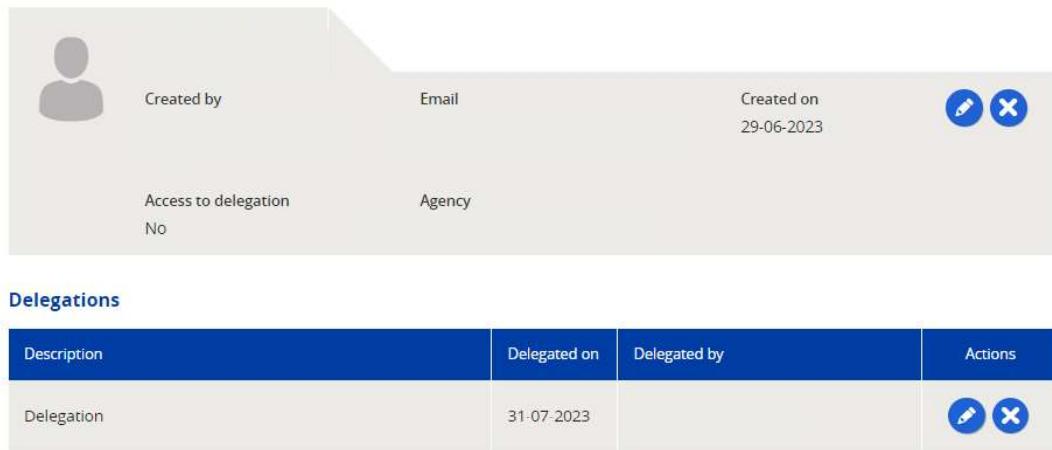
Delete a delegate

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



Name	Username	Registrant	Agent code
XYZ	abc		12345

2. Press the X button to delete the user.



The screenshot shows a user profile page with the following details:

- Created by:** (User icon)
- Email:** (Email icon)
- Created on:** 29-06-2023
- Access to delegation:** Agency
- No:** (checkbox)
- Delegations:** A table showing one delegation entry:

Description	Delegated on	Delegated by	Actions
Delegation	31-07-2023		(Edit, Delete icons)

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).

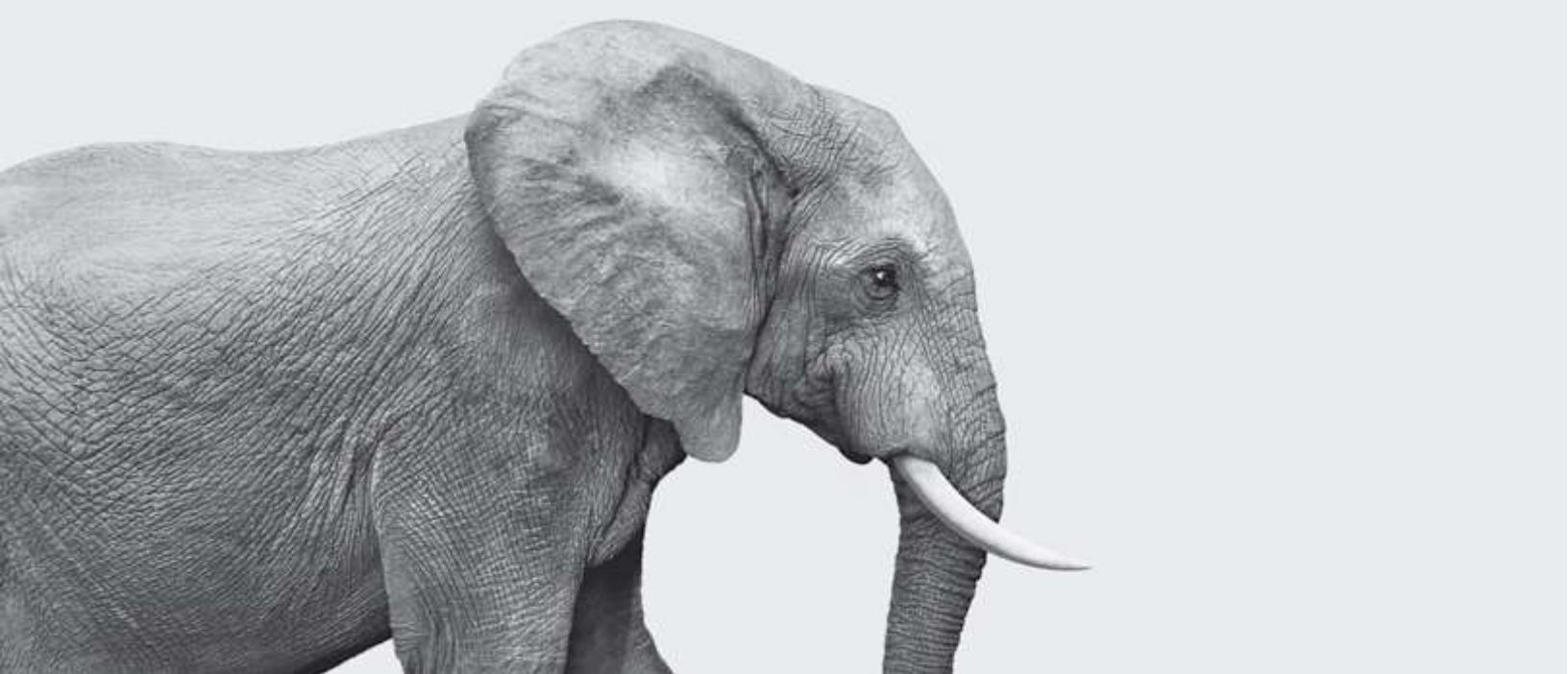
The *Manage delegations* page is displayed as soon as the delegation tool is opened if you have those access rights. This page allows you to choose for which agent you want to manage the delegations. You will only see users for whom you can act based on your roles. You can filter the list of users by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