iA Financial Group

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

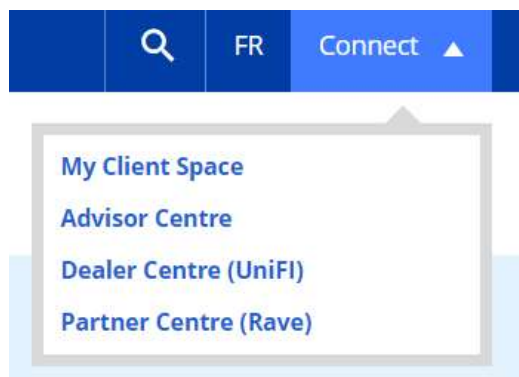**Delegator**: Person who grants their Advisor Centre access to someone else
Delegate: Person who will be granted access to someone else's Advisor Centre
Delegation: Process by which someone will be able to access the delegator's Advisor Centre

Using the Delegation tool

Accessing the application

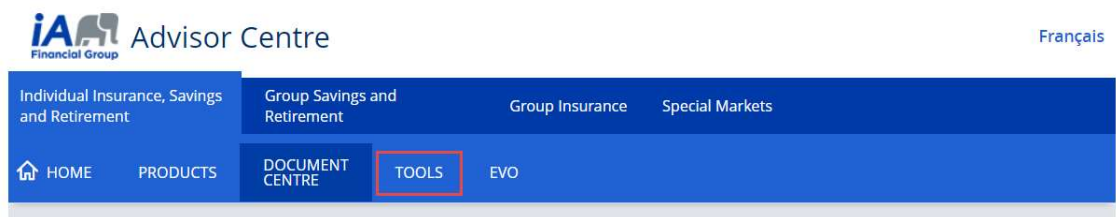1. Go to **ia.ca**, click on **Connect**, and choose **Advisor Centre.**
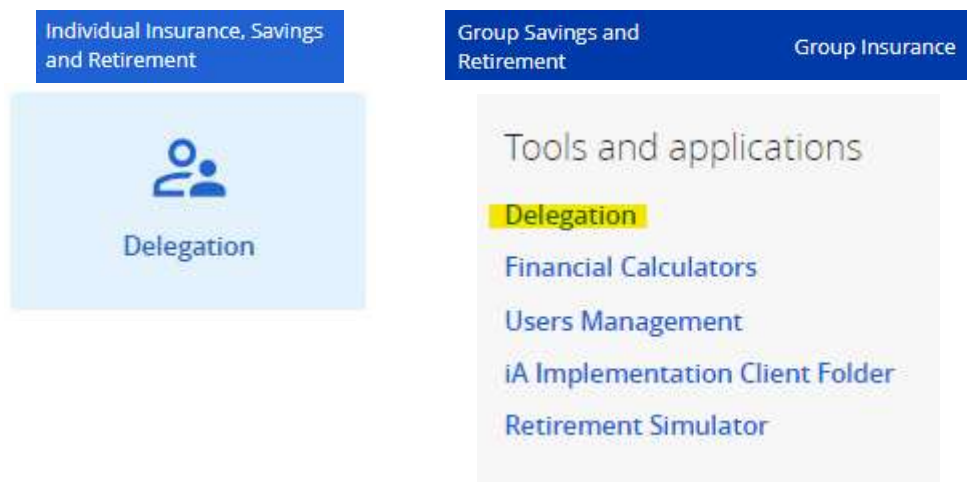

2. Select your line of business.

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)

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

New

Last name

User

Language

○ French

● English

Email

new@user.ia

This user can receive delegations from members of what agency?

[dropdown]

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).
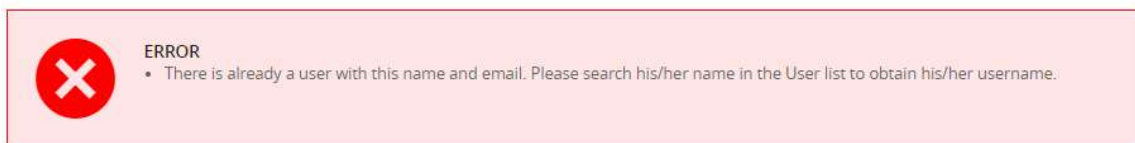
Delegation rights ❷

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

   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
     - ▶ ☐ BEST COMPUTERS
     - ▶ ☐ BLUE WORKERS
     - ▶ ☐ HEAVY HIGH-SCHOOL
     - ▶ ☐ 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
     - ▶ ☐ 00000
     - ▶ ☐ 00000
     - ▶ ☐ 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:
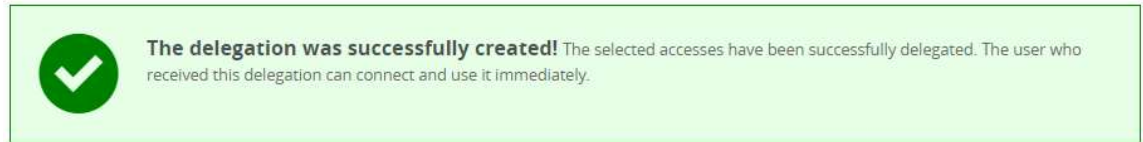   a. Username of the delegate
   b. Temporary password for the delegate

Delegation   Français

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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.

2. Click on 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)

    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

   ▶ ☐ BEST COMPUTERS

   ▶ ☐ BLUE WORKERS

   ▶ ☐ HEAVY HIGH-SCHOOL

   ▶ ☐ 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

   ▶ ☐ 00000

   ▶ ☐ 00000

   ▶ ☐ 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:

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

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.

2. Select the pencil button to edit delegation details.

3. Select the delegation details.

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:

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.

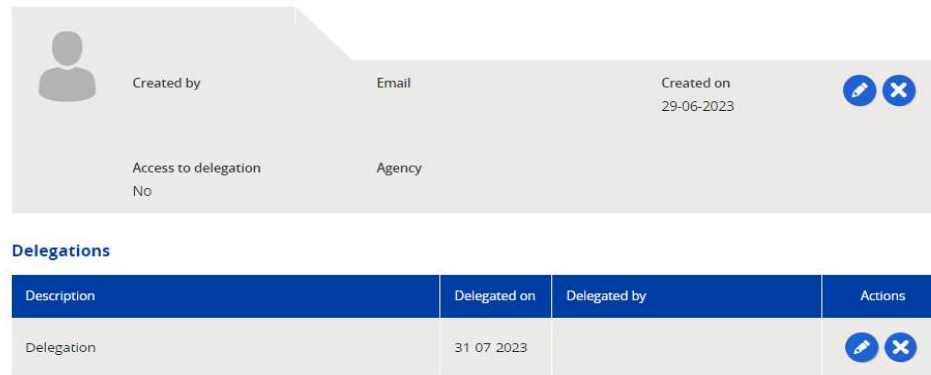2. Press the X button to delete the delegation.

3. Confirm your choice.
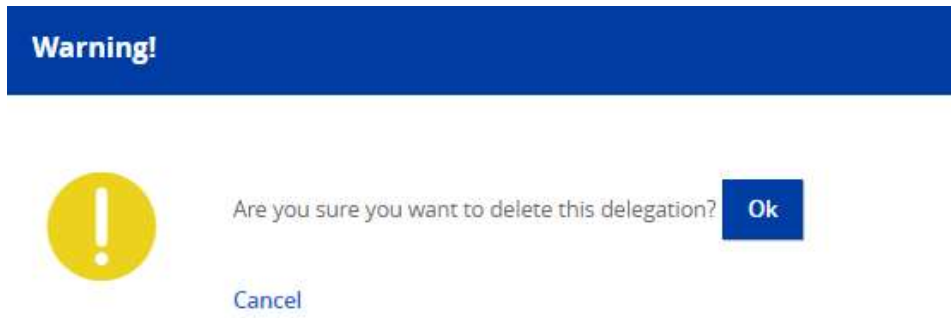
Edit a delegate's profile information

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

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

3. The user's profile displays several read-only fields, but allows editing of the following fields:

    a. Correspondence language
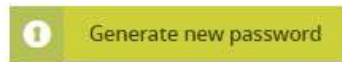   b. Agency (if applicable)
    c. Delegation rights

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.

Information!

You are about to generate a new password for this user. Do you want to continue? **Ok** Cancel
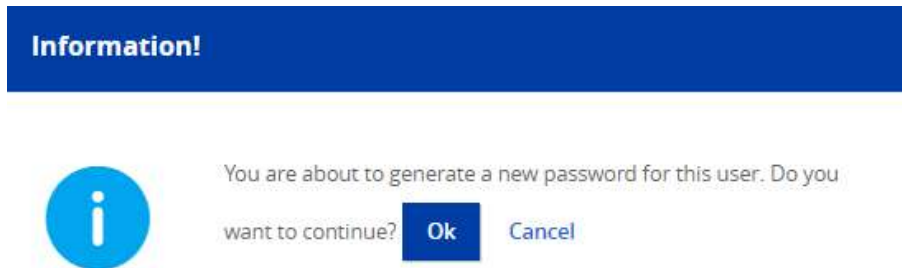
3. A temporary password is then displayed on the screen.

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.

Delegation   Français

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Users

Agencies
All

Search
☐ Only users for whom I have created a delegation

Name	Username	Registrant	Agent code
Name	Username	Registrant	Agent code
XYZ	abc		12345

Add a user

2. Press the X button to delete the user.

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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