

SmartDelivery™

Working with Licensed Assistants

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If you are an advisor who has designated life insurance licensed assistants, you can give these individuals access to a SmartDelivery package so that they can help with the eDelivery process.

Licensed Assistants, when assigned to a policy, can:

- view the policy on their SmartDelivery dashboard
- view the policy details and perform all aspects of the eDelivery process, except for eSigning the eDelivery documents.

Assigning a Licensed Assistant to eDeliver a Policy

A licensed assistant can be designated to help perform eDelivery using the 'ASSIGN LICENSED ASSISTANT' function on the eDelivery Review screen.

Select the assistant from the list of associated Licensed Assistants and click 'CONFIRM'.

Servicing advisors can click here to assign a licensed assistant.

The screenshot shows the BMO Insurance SmartDelivery interface. At the top, there's a navigation bar with 'Home', 'Portfolio', 'Commission', 'Referral Programs', 'Forms and Agreements', 'Smart App', and 'SmartDelivery'. Below this is a 'Back to SmartDelivery Dashboard' link. The main section is titled 'eDelivery review' and contains a table with the following data:

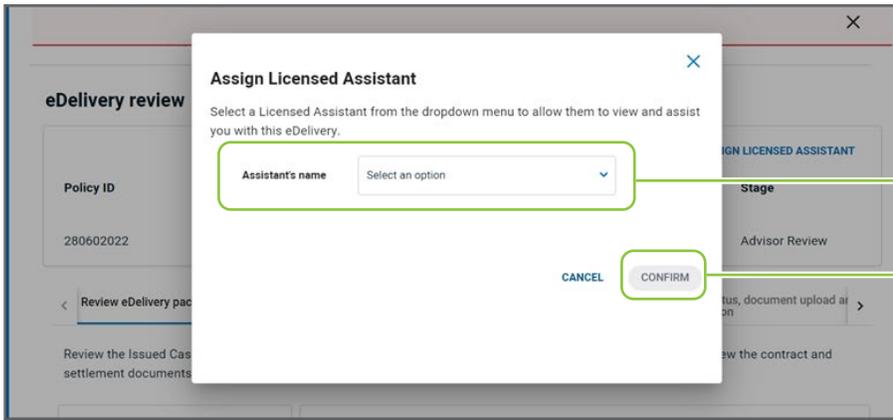
Policy ID	Owner	Insured	Ready for delivery date	eDelivery expiry date	Stage
280602022	Chris Owner	Pat Insured	Jun 30, 2022	Aug 12, 2022	Advisor Review

Below the table are several navigation links: 'Review eDelivery package', 'Download documents for manual signing', 'Confirm contact information and release eDelivery', and 'eSign status, document upload or submission'. A green box highlights the 'ASSIGN LICENSED ASSISTANT' button, which is located above the table. Below the table, there's a section for 'Issued Case Status Report' with a download icon and a note: 'To view the document, select it from the left pane.'

When a licensed assistant is assigned, the servicing advisor is still the individual who is ultimately responsible for the delivery and is thus required to eSign the delivery documents.

Licensed assistants will also be copied on all notifications that the advisor receives once they have been assigned to the policy.

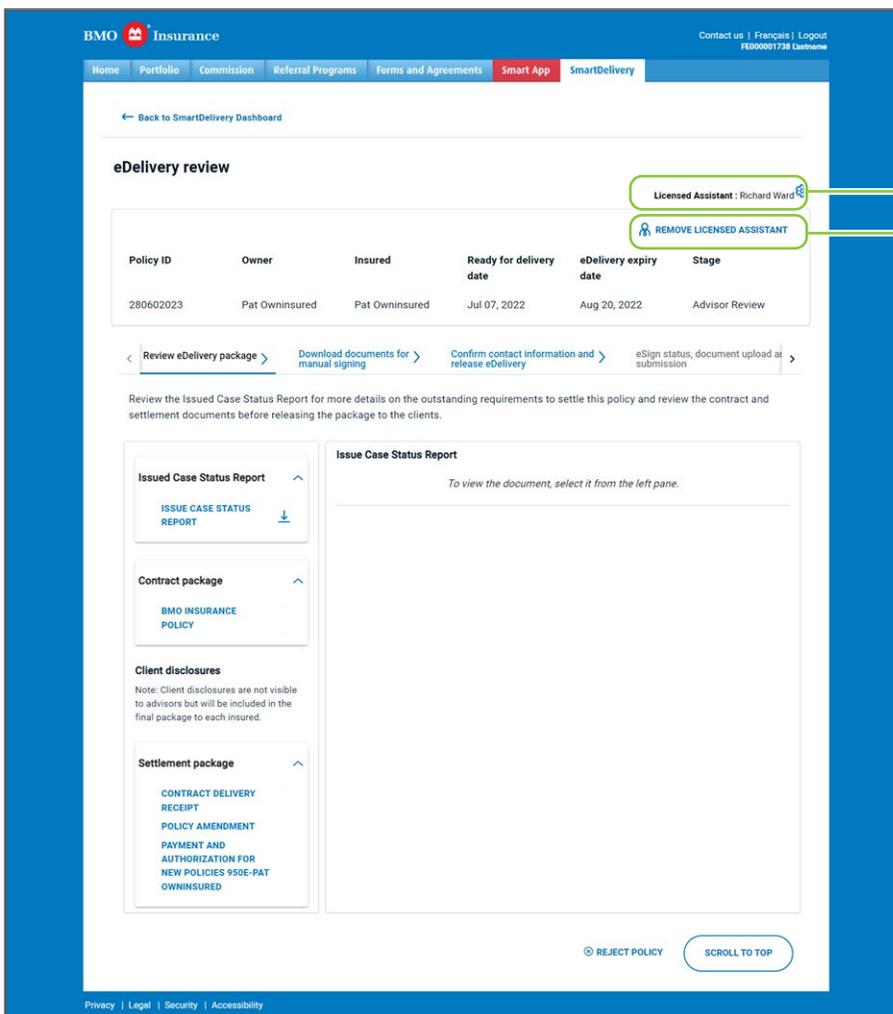
For added flexibility, if a particular licensed assistant was assigned to assist with the completion of an application in SmartApp, the servicing advisor can assign that individual or another of their licensed assistants to eDeliver the policy. In other words, licensed assistants are NOT automatically assigned.



Servicing advisors can select the licensed assistant who may be assigned to the policy.

Then, click 'CONFIRM'.

Once a licensed assistant is assigned, their name will be visible to the advisor on the eDelivery Review screen.



The assigned licensed assistant can also be changed, using the gear icon beside their name.

If the servicing advisor needs to revoke a licensed assistant's access to a SmartDelivery package, this can be done using the 'REMOVE LICENSED ASSISTANT' function.

Working with SmartDelivery as a Licensed Assistant

As described above, once a licensed assistant has been assigned to a SmartDelivery policy by the servicing advisor, the assistant can perform all the eDelivery functions described in this Guide, with the exception of eSigning the documents. The servicing advisor will still receive the eSign invitation and be prompted to sign once all other parties have completed their review and signatures.

The SmartDelivery dashboard of a licensed assistant will display all the policies that they have been assigned to work on.

The screenshot shows the 'Active eDelivery' dashboard. At the top, there are two tabs: 'Active eDelivery' and 'eDelivery History'. Below the tabs is the 'eDelivery summary' section, which contains six cards representing different stages of the eDelivery process:

- VIEW ALL: 1
- ADVISOR REVIEW: 1
- AWAITING E-SIGNATURES: 0
- FINAL REVIEW: 0
- E-SIGN REJECTED: 0
- E-SIGN EXPIRED: 0

Below the summary is a search bar with the text 'Search' and a magnifying glass icon. Underneath the search bar is a table with the following columns: Policy ID, Owner, Insured, Advisor, Expiry..., Stage, and View. The table contains one row of data:

Policy ID	Owner	Insured	Advisor	Expiry...	Stage	View
TERMD0002	Chris Owner	Pat Insured	FB000007978 L'ast...	Nov 17,...	Advisor Review	VIEW

When a licensed assistant views a policy, the name of the servicing advisor will be visible on the eDelivery Review screen.

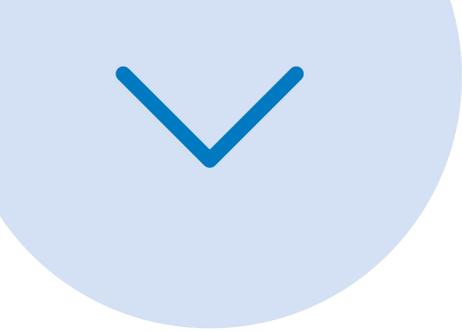
The screenshot shows the 'eDelivery review' screen in the BMO Insurance SmartDelivery interface. At the top, there is a navigation bar with the BMO Insurance logo and the text 'Contact us | Français | Logo'. Below the navigation bar are several tabs: Home, Portfolio, Communication Centre, Referral Programs, Forms and Agreements, Smart App, and SmartDelivery. The 'SmartDelivery' tab is selected.

Below the tabs is a 'Back to SmartDelivery Dashboard' link. The main content area is titled 'eDelivery review'. At the top right of this section, the 'Advisor' is listed as 'Advisor : Fb000007978 Lastname', which is highlighted with a green box.

Below the advisor information is a table with the following columns: Policy ID, Owner, Insured, Ready for delivery date, eDelivery expiry date, and Stage. The table contains one row of data:

Policy ID	Owner	Insured	Ready for delivery date	eDelivery expiry date	Stage
TERMD0002	Chris Owner	Pat Insured	Oct 03, 2022	Nov 17, 2022	Advisor Review

Below the table are four navigation links: 'Review eDelivery package', 'Download documents for manual signing', 'Confirm contact information and release eDelivery', and 'eSign status, document upload and submission'. Below these links is a section titled 'Issue Case Status Report' with a link to 'Issue Case Status Report'.



? Need help?

If you require assistance with the SmartDelivery process, please contact our Digital Support Team (DST) at Insurance.DST@bmo.com or 1-855-208-3675 from Monday to Friday, 9:00AM - 6:00PM ET.

If you have questions about the specific delivery requirements or contract for a specific policy, please contact your MGA/National Account New Business team.

Let's connect

To find out more about BMO Insurance products, please call your MGA, contact the BMO Insurance regional sales office in your area or call **1-877-742-5244**.



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Insurer: BMO Life Assurance Company.