

EquiNet Quick Tips

Need some help navigating your way around EquiNet? We've put together the top 5 quick tips on the following topics, based on the most frequently mentioned questions from advisors:

[1. Policy Inquiry/New Business Pending Inquiry](#)

[2. Document Lookup](#)

[3. Policy Statements & Correspondence](#)

[4. Username & Email Address Support](#)

[5. Need more help?](#)

See more details and information about other site tips in this [FAQ](#) created to help you find your way around.

1. Policy Inquiry/New Business Pending Inquiry

You can find your New Business Pending Inquiries under "Policy/New Business Inquiry" on the ribbon. **You must be logged in** to view your Policy/New Business Pending Inquiry.

- Navigate to Policy/New Business Inquiry on the ribbon
- Click on Policy Inquiry or New Business Pending Inquiry and search using Policy Number, name, etc.

The screenshot shows the EquiNet interface. At the top, a ribbon contains various icons, with 'Policy/New Business Inquiry' highlighted in a red box. Below the ribbon is a breadcrumb trail: 'Home > Policy Inquiry'. The main heading is 'POLICY INQUIRY'. Underneath, there are two tabs: 'Policy Inquiry' and 'New Business Pending Inquiry', with the latter highlighted in a red box. The search area contains several input fields: 'Policy Number' (with a placeholder 'Policy Number'), 'First Name' (with a placeholder 'First Name'), 'Last Name' (with a placeholder 'Last Name'), 'Organization Level' (a dropdown menu with 'Agent' selected), 'Name' (with a placeholder 'Organization Name'), and 'Code' (with a placeholder 'Organization Code'). There is a 'Lookup' button to the right of the 'Code' field. At the bottom left, there are 'Search' and 'Reset' buttons.

2. Document Lookup

Don't see Document Download and/or Correspondences applications?

Document Download and Correspondences have been merged into one section and are now called **Document Lookup**. You need to be logged in to be able to view/access this application. Click on Document Lookup from the 'ribbon' to access this application.

DOCUMENT LOOKUP

Organization Level	Name	Code	Lookup
Agent	Organization Name	Organization Code	Lookup
Policy Number	Insured First Name	Insured Last Name	
Policy Number	First Name	Last Name	
Document Type	Read/Unread		
	All		
From	To		
2017-10-10	2019-10-10		
Search	Reset		

3. Policy Statements & Correspondence

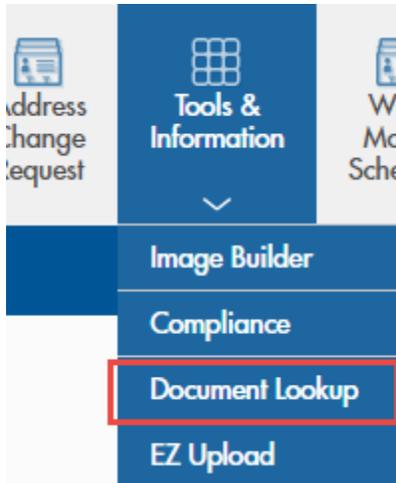
You need to be logged in to be able to view/access your Policy Statements & Correspondence. Once logged in, the ribbon menu will appear and Policy Statements & Correspondence will be on the far right at the top of your screen:



Please note: If your browser window is zoomed in past 100% you may need to scroll to the right of the homepage to access Policy Statements & Correspondence.



Once you click on Policy Statements or Correspondences you will be taken to Document Lookup. You can also find a link to Document Lookup from the "Tools & Information" ribbon drop down menu:



Once you are in the Document Lookup application,

- To search Policy statements: Input Policy number or Insured name and select Policy Statement from the Document Type dropdown menu and click on Search
- To search Correspondence: Input Policy number or Insured name and select Correspondence from the Document Type dropdown menu and click on Search

Document Type



It is also possible to search by date range by selecting the Document type (Correspondence or Policy Statement) and providing a date range* (From and To date).

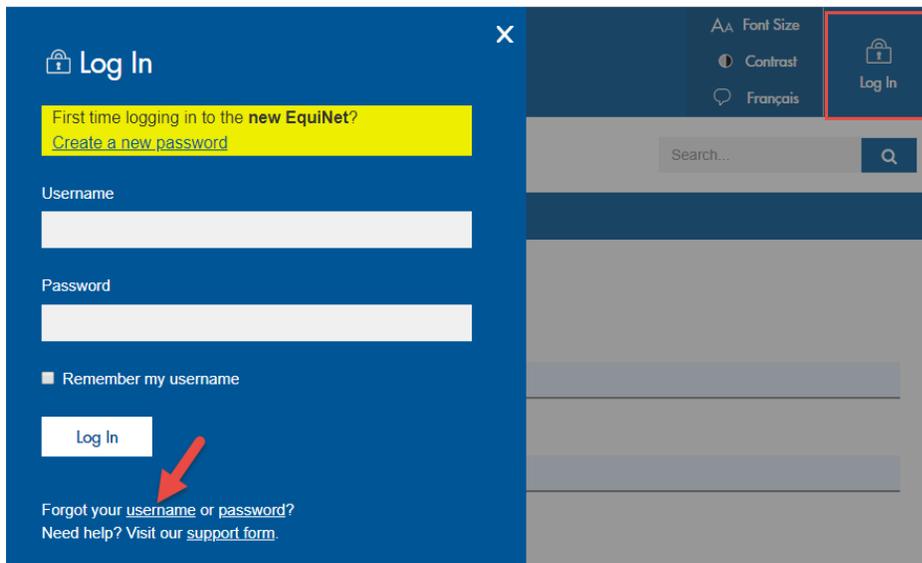
*The date range provided cannot exceed two years. For example - if the "From" date is 2017-01-01, the "To" date cannot be greater than 2019-01-01.

From	To
<input type="text" value="2017-01-01"/>	<input type="text" value="2019-02-01"/>
	<small>To date cannot be greater than 2019-01-01</small>

4. Username and Email Address Support

I forgot my username, can you help?

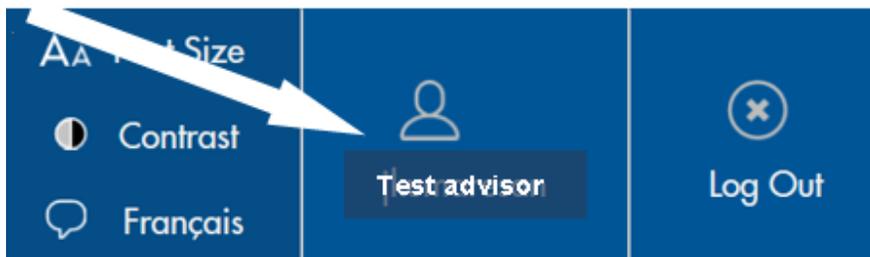
Your username can be recovered by clicking on Log in at the top right of EquiNet, and clicking on "Forgot your username""



How do I update my email address?

You need to be logged in to be able to do this.

1. Click on the user icon (shown on screenshot below)



2. On the profile page, the current email address will be prefilled. You will need to enter a new email and confirm the email. Click Save

PROFILE

Email Password

Current Email

New Email

Confirm Email

5. Need more support?

Submit a request for support using the EquiNet Support Form.

For a Logged-out user, the support form can be accessed from either the

- a) Login screen or
- b) Site footer

For a Logged-in user, the support form can only be accessed from the Site footer

Accessing the support Form via Log In screen

1. Click on Log In on the top right corner of the website



2. On the Log In screen, click on the Support form. This action will open the support form. The user is required to fill out Name, EquiNet username, Problem Area and Problem Description and click 'Submit'.

Log In

Username

Password

Remember my username

Log In

Forgot your [username](#) or [password](#)?
Need help? Visit our [support form](#).

SUPPORT FORM

Name

EquiNet Username

i.e. 111B2jdoe

E-mail

Phone number

Advisor Code

Problem Area

Not Applicable

Problem Description

Submit

Accessing the support Form via Site footer