

# EZ Upload

An efficient way to transfer files securely.

## Convenient

Submit and track the status of applications...all in one location - EquiNet

## Simple

Easily upload life and critical illness insurance applications and related documents.

## Secure

Ensure your clients' information is kept safe and secure.



## GETTING STARTED

- You need a valid Equitable Life<sup>®</sup> advisor code and an EquiNet<sup>®</sup> username and password.
- You need an online connection.
- Compatible browsers: Google Chrome, Internet Explorer 11, Edge, and Safari.
- Login to EquiNet and select EZ Upload from the "Ribbon" just below the main menu.

Equitable Life of Canada | EquiNet

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### EZ UPLOAD

User Tips

- Upload up to 10 documents including the Application and any related Applications and documents.
- The files can be saved as a .pdf, .jpg, .tif, .gif, .jpeg, or .png and must not exceed 15MB per file (.pdf is the recommended format).
- Scan documents in black and white only (not greyscale or colour) with a recommended resolution of 300 dpi to ensure legibility.
- You must scan all pages including those pages that were not used.
- Once scanned documents have been submitted, please retain the originals for 3 weeks should any verification be required. Do not send originals to Equitable's Head Office. Your agency's Record Retention Procedures and applicable legislation in your province will apply.
- If clients pay for their TIA by "Pre-Authorized Debit when Application is received", please ensure they have sufficient funds in their account as the payment will be taken immediately upon receipt of the Application.
- System Requirements: The following browsers are supported - Google Chrome, Internet Explorer 11, Edge, and Safari.
- After you upload your files, ensure you click the Submit button to properly submit them. If you do not click Submit your files will not be uploaded to the system.

+ Choose Upload

## USE IT FOR

- Upload documents, including applications and any related documents, policy change forms, or any documents you would normally mail, fax or hand deliver to Equitable Life Head Office.
- If you are using *EZcomplete* to submit an application online:
  - Use EZ Upload to upload any documents/forms that require a wet signature.
  - These forms may include Participating Policyholder Notification of Meetings Form, CI Special Offer, Replacement/Cancellations Forms, Business Information Form, AML Forms, etc.
- If you are submitting a paper application:
  - Using EZ Upload to upload the application and required documents/forms saves you the expense of sending it by registered mail/courier.





## SCANNING DOCUMENTS FOR UPLOAD

- Scan all documents required for the application to be processed.
- The files can be saved as a .pdf, .jpg, .tif, .tiff, .gif, .jpeg, or .png and must not exceed 15MB per file
- Pdf is the recommended format.
- Remove all staples before scanning.
- It is important to ensure the quality of the scan is clear and legible since it will form part of the Contract if a policy is issued.
- Scan documents in black and white only (not greyscale or colour) with a recommended resolution of 300 dpi to ensure legibility.

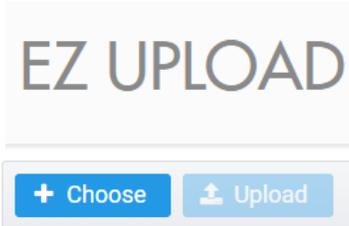
### Scan all pages, even blank ones

You must scan all pages of the application, forms, etc. including those pages that were not used.

Submitting partial documents will delay processing as we will need to follow-up to ensure pages were not inadvertently missed.

## UPLOADING DOCUMENTS

- Once all required documents have been scanned and saved to your computer, you are ready to upload them using EZ Upload.
- Click the **+ Choose** button and select the files you want to upload.
- If there are more than 10 documents, you will need to upload them in two separate uploads.
  - Create a cover memo to include with the second submission indicating that these files are a continuation of the previous submission for (indicate the client's name) and requesting that they stay together.
- Click the **Upload** button. If you do not click Upload, your files will not be uploaded to the system.



## AFTER DOCUMENTS HAVE BEEN UPLOADED

- A confirmation screen will appear confirming that your upload was successful and provide the opportunity to submit additional documents.
- You will also receive an email confirming your documents have been received and will be processed.
- Once scanned documents have been uploaded, please retain the originals for 3 weeks should any verification be required.
- Do not send originals to Equitable Life's head office. Doing so can create processing delays because:
  - We may inadvertently process the original as a duplicate if we are not clear that the original was previously scanned and uploaded.
  - We would need to review both the scanned and original materials to ensure they are identical.
- Your agency's Record Retention Procedures and applicable legislation in your province will apply.



## NEED MORE INFORMATION?

- Contact your Regional Sales Manager or Equitable Life's Advisor Services Team.

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