

EquiNet

Frequently Asked Questions


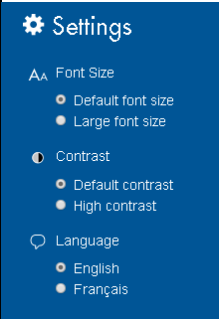
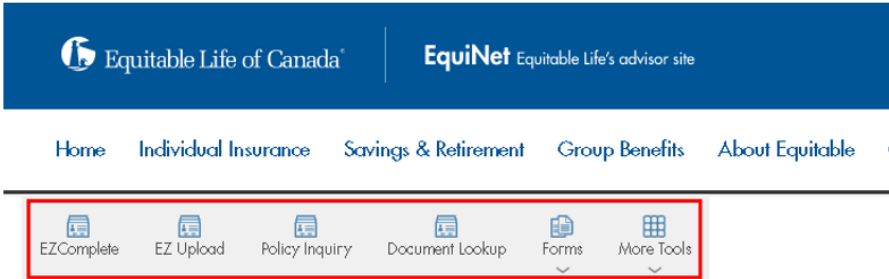


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EquiNet

Frequently Asked Questions

Q	How do I change the site language from English to French or vice-versa?
A	<p>Step 1) On the top right corner, there are few site settings. Click on the language setting (as shown below)</p>  <p>Step 2) On the settings menu, select the desired language</p> 
Q	Do I need to change the site language to French every time I login?
A	No, setting the language is a one-time activity. The site settings will be remembered if you are using the same browser.
Q	How do I access the EquiNet online tools* ?
A	<p>You need to be logged in to view/access the online tools. They are placed on a panel (which we call the 'Ribbon') just below the main menu. See screenshot below</p>  <p>*EZComplete, EZ Upload, Policy Inquiry, Document Lookup, Commission Statements, Compensation Inquiry, etc. are the EquiNet online tools</p>
Q	I don't see Document Download and/or Correspondences applications, where are they now?

A

Document Download and Correspondences have been merged into one section and are now called Document Lookup. See screen-print below. 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 Agent	Name Organization Name	Code Organization Code	Lookup Lookup
Policy Number Policy Number	Insured First Name First Name	Insured Last Name Last Name	
Document Type	Read/Unread All		
From 2017-10-10	To 2019-10-10		
<input type="button" value="Search"/> <input type="button" value="Reset"/>			

Q

How do I search for Policy Statements and Correspondence

A

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.

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

Correspondence
Policy statement

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

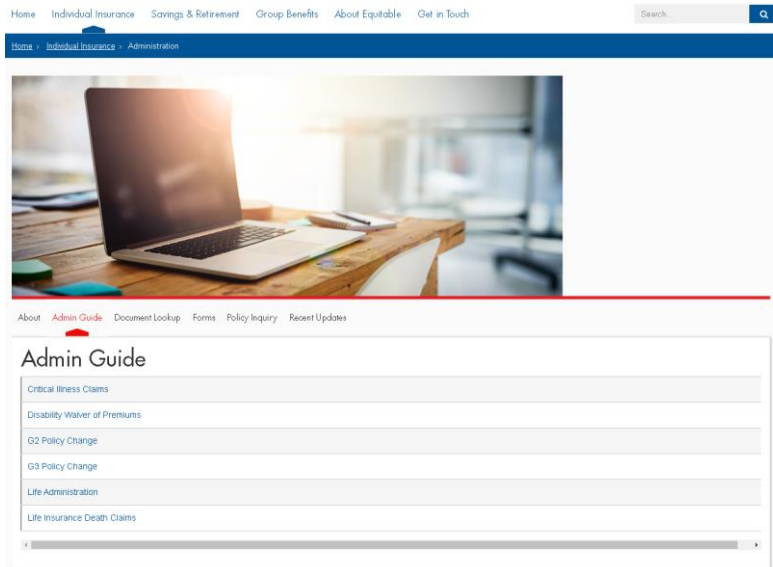
From 2017-01-01	To 2019-02-01
To date cannot be greater than 2019-01-01	

Q

Where is the Admin Guide located?

A

You need to be logged in to be able to view/access the Admin Guide. Click on Individual Insurance and navigate to Admin Guide. See screenshot below



Q

Where is the pop down notification that I get when I sign-in?

A

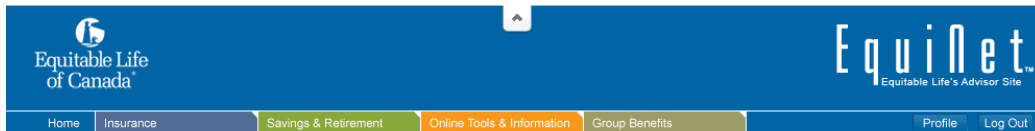
Before

The counts displayed are the

Total number of policy statements generated in the last 30 days

Total number of Notices, Confirmations and Letters generated in the last 60 days

17617 Policy Statements have been added to Document Download since September 10, 2019. [Get Statements](#)
 You have 10000 pieces of [correspondence](#) since July 23, 2019

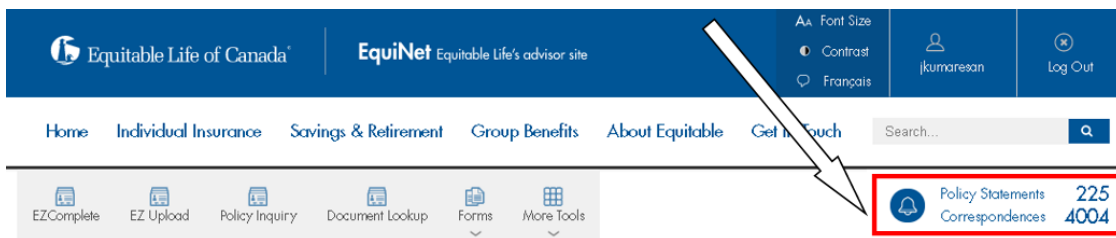


Now

The counts displayed are the

Total number of policy statements generated in the last 60 days

Total number of Notices, Confirmations and Letters generated in the last 60 days



Q How do I access Forms (Individual Insurance, Savings and Retirement and Group Benefits)?

A The forms can be accessed by clicking on the menu item (Individual Insurance OR Savings and Retirement OR Group Benefits)

Individual Insurance Forms



Savings and Retirement Forms



Group Benefits Forms



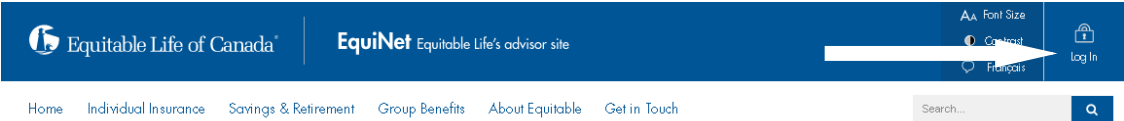
Q How do I view/download a French form?

On the Forms page, The column titled Available Languages will display the translated versions of the form. Click on the form name to view/download.

See screenshot below.

FR means French, ZH means Chinese, BLANK means not translated.

Form Number	Cover	Marketing Material Name	Available Languages
1530		Immigrant/Temporary Resident Underwriting Guidelines	ZH FR
1024		Guide to Individual Underwriting	FR
1024		Guide to Underwriting	FR
1027		Additional/Updated Customer Information	FR
1027		Additional/Updated Customer Information (fillable / savable)	FR
1170		Pivotal Solutions Fund Facts	FR

Q	Where is the Address Change form?
A	<p>You need to be logged in to be able to view/access the form. This form will available under</p> <ul style="list-style-type: none"> • Individual Insurance → Forms • Savings and Retirement → Forms <div data-bbox="196 275 719 974"> <h3>ADDRESS CHANGE REQUEST</h3> <p>MGA Number <input type="text" value="MGA Number"/></p> <p>Completed by <input type="text" value="Completed by"/></p> <p>Advisor Email Address <input type="text" value="Advisor Email Address"/></p> <p>Date for Change to Take Effect <input type="text" value="Date for Change to Take Effect"/></p> <p>Policy Number <input type="text" value="Policy Number"/></p> <p>Other Affected Policy #1 <input type="text" value="Other Affected Policy #1"/></p> <p>Other Affected Policy #2 <input type="text" value="Other Affected Policy #2"/></p> <p>Other Affected Policy #3 <input type="text" value="Other Affected Policy #3"/></p> <p>Other Affected Policy #4 <input type="text" value="Other Affected Policy #4"/></p> <p>Other Affected Policy #5 <input type="text" value="Other Affected Policy #5"/></p> </div>
Q	How do I submit a request for support?
A	<p>You need to use the EquiNet Support Form.</p> <p>For a Logged-out user, the support form can be accessed from either the</p> <ol style="list-style-type: none"> a) Login screen or b) Site footer <p>For a Logged-in user, the support form can only be accessed from the Site footer</p> <p><u>Accessing the support Form via Log In screen</u></p> <div data-bbox="196 1486 1507 1780"> <p>Step 1 - Click on Log In on the top right corner of the website</p>  <p>Step 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'.</p> </div>

Accessing the support Form via Site footer

Q Why does my account get locked?

A As a security measure, the EquiNet account gets automatically locked temporarily after 5 failed login attempts. A failed login attempt is when an user enters a non-valid user ID or an incorrect password. On 5 such failed login attempts, the system would apply a temporary lock that lasts for 30 minutes.

SIGN IN

- We are sorry, your account has been temporarily locked. Please try again in 30 minutes.

Q How can I unlock my account?

A As the message suggests, the lock only lasts for 30 minutes and the user will be able to login again after 30mins.

However, if the user needs to get access to his/her account sooner, it is possible to reset the password using the Forgot password link from the Log In page

Q My account is disabled. Can you help?

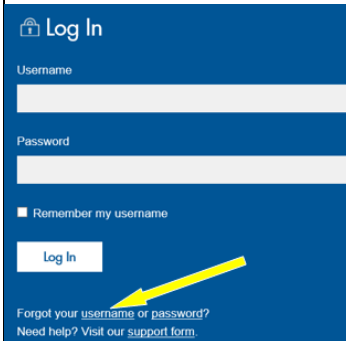
A Yes, we can enable a disabled account, but we need to verify the individual and that the account has been disabled before we can enable an account.

1. Confirm that the user's account is disabled. The message shown on the login screen for a disabled user is shown below
"Your account has been disabled. Please contact our EquiNet Support Department at 1-800-668-4095 or email equinetsupport@equitable.ca."

2. The account will then need to be reviewed and enabled by the Producer Contracting staff.

Q I forgot my username, can you help?

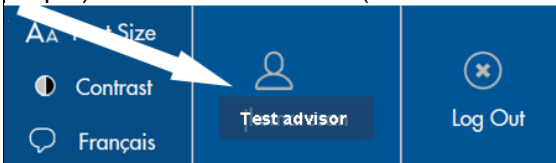
A The user name can be recovered by the user by clicking on 'username'



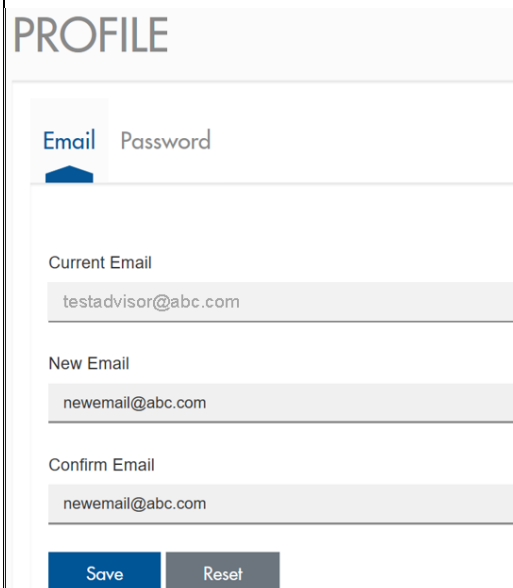
Q How do I update my email address?

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

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



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



Q	Is there a mobile site for EquiNet?
A	There is no separate mobile site but our EquiNet https://advisor.equitable.ca/advisorhome will present itself as a mobile friendly site when viewed on a mobile or other personal device.