# Frequently asked questions

## Lia system and software information

If you have any questions, please contact us by email at
**Lia@assumption.ca** or by phone at **1-855-853-6040 (option 2)**

| | Question | Answer |
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| 1. | What is Lia? | Lia is Assumption Life's electronic sales platform for individual life insurance. Lia allows you to quote and submit life insurance applications using a single, user-friendly tool. |
| 2. | How do I install Lia? | Go to **assumption.ca/lia** or go to the advisor corner website, under the **Individual Insurance** tab, hover over **Sales Tools** and select **Lia Sales Platform**. On this page, you will find download instructions and tutorial videos. |
| 3. | Will Lia run on my Mac computer? | Yes, Lia runs on Apple computers and iPad tablets. |
| 4. | Will it work on my tablet? What devices are compatible? | LIA runs on iPad and Android Tablets. Any tablet with 1GB ram and a Dual Core processor should be compatible. However, devices running Windows XP or below, are no longer compatible. |
| 5. | Can I start working on my computer and complete the application on my tablet? | Yes, with the help of our cloud feature. See answers to questions 7 and 8. |
| 6. | What is the cloud? | You are able to save applications online. This allows you to transfer applications between computers or devices (PC to tablet). |
| 7. | How do I use the cloud? | Select the **Saved Applications** tab. Click the check box on the left and then press on **Upload Selected Items**. Once uploaded, you can now download you applications on your other devices by logging into your Lia, going in the **Cloud Applications** tab, selecting the applications and pressing **Download.** |
| 8. | Is my information secure? | Yes! Assumption Life uses the latest security practices to ensure your data is safe. All sensitive information is encrypted, and accounts are password protected. Furthermore, the web systems used when you submit your application are SSL certified. |

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| 9. | How do I know if I have the latest version of Lia? | Press on **Menu**, go to the **Settings** tab, under System Version, your current version will be displayed as well as the latest version available. Click **Download** to install the latest version. |
| 10. | Are updates mandatory? | Yes, you must have the latest version of Lia in order to submit your application. A message will appear when you open Lia and will let you know if an updated version is required. |
| 11. | Are all Assumption Life products on Lia? | Yes, all products are featured in Lia, including any new/updated products! |
| 12. | Where do I find product information/forms? | **In Lia:** you can find the necessary documents by clicking on the menu at the top left, then choosing the Documents tab.<br>**Advisor Corner:** all of our documents are also available in the documentation center on the Advisor's Corner website. |
| 13. | What is Adobe AIR and should I download its updates? | Adobe AIR is a cross-platform runtime that allows systems to work on multiple devices. Yes, keeping your Adobe AIR runtime up to date will ensure your Lia runs efficiently. |
| 14. | How do I get more information on products? | In Lia, from the slide out **Menu** on the left, open the **Documents** screen and choose the suitable product guide. You can also visit **assumption.ca/advisorcorner**. |
| 15. | Is the Signature and Authorization Form the same for all products? | Yes it is. It was updated, so please make sure you use the latest version.<br>This form is essential and has to be sent back to us once completed and signed. Without it, we won't process your application. The fax number and email address can be found on the top of the form. |

## Account and password information:

| | Question | Answer |
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| 1. | Do I need a password/where can I get my password? | Yes, a password is required. Your password with Lia is the same one you use in Advisor Corner. If you need a new password, go to Advisor Corner (**assumption.ca/advisorcorner**), click on **Forgot Password** and enter your e-mail address we have on file. You will then receive an e-mail with your new password. |
| 2. | Do you have a demo account? | Yes! The username and password is: **Lia.test2013** *(capital L).* You must create your own, unique, security question. |
| 3. | How do I change my password? | Go to Advisor Corner, log in with your current details, click **Pick One** and select **Update your Password**. Your new password will work in Advisor Corner and in Lia. |

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| 4. | Will my username and password be saved so I don't have to type them in when I log in? | The username will be saved but for security reasons, you will be asked to type-in your password when you log in. In the event that your username is not saved, or you have forgotten your username, go to **assumption.ca/advisorcorner**. On the home page, under the login box, click on **Forgot Username.** Fill in your e-mail address and it will be sent to you. |
| 5. | If I have logged in using my security question, how do I get my password? | Go to **assumption.ca/advisorcorner**. On the home page, under the login box, click on **Forgot Password**. Fill in your e-mail address and it will be sent to you. |
| 6. | How do I log into my account? | Your Assumption Life username and password is the same for both Lia and Advisor Corner. If you need help with logging in, contact our help desk **lia@assumption.ca** for assistance. |
| 7. | Can I have more than one profile on Lia? | Yes. If you have several Assumption Life profiles, you can add profiles by clicking on **New User Profile** on the Lia login screen. You must be connected to the Internet to log into a profile for the first time. |
| 8. | How do I change my username? | You cannot change your username. |
| 9. | How do I change user accounts? | From the login screen, you can select the drop-down and select from created user profiles. |
| 10. | How do I change the language on the system? | You can change the system language from the Login page on the top right corner of your screen. |
| 11. | Other than English and French, are there more languages available? | The system currently supports the two official languages: **French** and **English**. |
| 12. | How do I know in what language my application was submitted? | The application will be sent electronically in the language used at the time of submission. For example, if the system is set to English before Submit is clicked, the application will be sent in English. |
| 13. | How do I get my production reports? | Log in to Advisor Corner (**assumption.ca/advisorcorner**) with the same username and password you use for Lia. Under Quick Links, select Pick One and press Production Report. |
| 14. | Where is my commission information? How will I get my commission? | Log in to Advisor Corner (**assumption.ca/advisorcorner**) with the same username and password you use for Lia. Under Quick Links, select Pick One and press Compensation – Sales Force. |

## Submitting Applications:

| | Question | Answer |
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| 1. | How do I submit an application? | First, you will need to be connected to the Internet to submit your application. Under the Review and Submit tab follow these steps:<br>**Step 1**. In **Review and Submit**, review the application by clicking on **View Summary**, **Step 2**. Finalize the e-signatures or paper signatures,<br>**Step 3**. Click **Submit Application**. |
| 2. | How will I know if my application was successfully submitted? | You will receive an email with a 6-digit policy number if the application was successfully submitted. You can also view your applications for 72 hours in the **Submitted Applications** tab in Lia. |
| 3. | How do I check the status of an application? | If you login on Advisor Corner, (**assumption.ca/advisorcorner**), you can find status updates in the **Quick Links** menu to the left of your screen, select **Pick One** and press **New Application Status**. |
| 4. | How do I save if I don't have time to complete an application? | At any time, you can press the Save button located at the top right corner of your Lia. Your application will automatically be saved and stored in the My Applications section under Saved Applications. You can work on your application whether you are connected or not to the Internet. |
| 5. | How do I find previously submitted applications? | Applications submitted in the last 72 hours can be found in the **Submitted Applications** tab in Lia. To find the applications sent more than 72 hours ago, log in to Advisor Corner (**assumption.ca/advisorcorner**) with your username and password. Once there, you can find previous applications in the **Quick Links** menu, to the left of your screen, select **Pick One** and press **Online Product Report**. |
| 6. | How do I access a saved app that I have already worked on? | To open an application you have already worked on, go to the **Saved Applications** section, select the application you wish to work on and click **Open**. |
| 7. | Why can't I submit my application? | Lia may not be able to submit an application in the following situations:<br><br>i. No Internet access: Please ensure your device is connected to the Internet and that the Internet connection is operational. If you are still unable to submit, check your firewall settings to ensure they are not blocking Lia applications.<br><br>ii. Software version: The system will not allow you to submit an application if you are using an old version of Lia. Please verify that you are using the most recent version of Lia before submitting your application. |

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| | | iii. Wait time: Submitting an application should take less than 60 seconds. However, Lia may require more time depending on your Internet speed and whether or not you have attached large files with your application. If the submission process takes more than five minutes, please contact the Assumption Life technical support desk: 1-855-853-6040 (option 2)<br><br>iv. Security question: When you log into Lia using your security question, the system automatically disables the submit permission. To submit, you first need to enter your password.<br><br>v. Out-of-date profile information: When you submit, Lia verifies your profile details before sending the application. Please ensure that important profile information, such as your username, password and agent code, are valid and up to date.<br><br>vi. Account permissions: Assumption Life reserves the right to control user's ''submit application'' permissions. To submit, users must have a valid, active Assumption Life account. Your MGA may also ask Assumption Life to disable the submit permission on your account. |
| 9. | Why aren't my saved policies there? | When you log in using security answers, saved applications are only shown for 72 hours. Please log in with your password to view all of your applications. |
| 10. | How do I add a life rider to an existing policy? | Login with your Lia username and password, click on the **Add Life Rider** square located on Lia's main page. Then, simply enter the policy number and fill out the rest of the application. |

## Electronic signature process:

| | Question | Answer |
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| 1. | How does the electronic signature process work? | In the **Review and Submit** section of your Lia application, select the option **Automatically Generated by Lia**. Once you have done so, it will populate an option in the **Electronic Signature** section called **Click to Sign**. Select the **Click to Sign** option and input your client's unique e-mail addresses, confirm it twice and select the **Send Emails** button. (This applies to both in-person and non-face-to-face sales). |
| 2. | Are there any limits, i.e. face amount, product availability for using the e-signature process? | No limits, it's available for all our products and for any face amounts up to 4 million dollars. |
| 3. | Do you have training for the electronic signature feature? | Yes, discover our **Resources and Training** section in Advisor Corner (**assumption.ca/advisorcorner**) when you hover over, with your mouse, the **Individual Insurance** tab. |
| 5. | How come I can't use the e-signature process? | If you have more than 3 Persons Insureds, the e-signature process will be disabled. You will have to use the paper copy called **Client Notice and Signature Authorization** form available in Lia or in Advisor Corner (**assumption.ca/advisorcorner**) when you select our **Document Center** located on the top right corner of the home page. |
| 6. | Can we sign with any device? | With our electronic signature process, you can **Click to Sign** on a smartphone, tablet, or a computer with the help of your mouse or simply using your fingertip. |
| 7. | Can I use the electronic signature while offline or online only? | No, you have to be connected to the Internet to use the e-signature process. |
| 8. | Is an e-mail address required to do the electronic signature process? | Yes, you must provide a unique e-mail address for each signer. |
| 9. | What happens if signers share the same e-mail address when using the electronic signature process? | You must provide a unique e-mail address for each signer to process the electronic signature in Lia. |
| 10. | What happens if the signers do not Click to Sign or forgets to Click to Sign when doing the electronic signature process? | After 2 days, if the signers have not completed the **Click to Sign**, you (the advisor) will receive an e-mail asking to follow up with your client. |

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| 11. | Do I need to send in additional paperwork after using the electronic signature? | No. The signed document is automatically sent to Assumption Life. |
| 12. | When will I (the advisor) have to Click to Sign? | Once all signers have completed the **Click to Sign** process, you will receive an e-mail inviting you to press a link and **Click to Sign** the form. |
| 13. | What do I do if a signer contacts me (the advisor) saying that they haven't received the email invitation to Click to Sign or have deleted that email? | If you have not yet submitted the application, you can go back in the **Click to Sign** section and re-enter the e-mails of the signers to resend the e-mail invitation.<br>If the application has already been submitted, contact our technical support team at 1-855-863-6040 (option 2) so they can resend the e-mail invitation. Or you can choose to go ahead with the paper copy. |
| 14. | What happens if a signer clicks on the Opt Out button? | The process will be stopped for every signer. |
| 15. | Can a copy of the signed form be downloaded? | Yes, it can be downloaded once every signer, including the advisor, has completed the **Click to Sign** on the form. All signers will receive an e-mail with a link to download the PDF format. |
| 16. | What do I (the advisor) have to do once the signature form has bent sent to Assumption Life? | You have to go back in Lia and submit your application. |
| 17. | Will the paper version of the signature form still be available? | Yes, the paper version still exists. Our updated **Client Notice and Signature Authorization** form can be found in our **Document Center** located in Advisor Corner (**assumption.ca/advisorcorner**). |