



Lia: Frequently asked questions



System and software information

	Question	Answer
1	What is Lia?	Lia means Life Insurance Anywhere and is Assumption Life's new electronic sales platform. With Lia, you will be able to quote and submit life insurance apps all in one tool and work from any computer or tablet.
2	How do I install Lia?	Go to lia.assumption.ca to download Lia. You will also find download instructions and a tutorial video.
3	Will this run on my Mac computer?	Yes. Lia runs with Apple computers and 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 application using the check box on the left, and press on Upload selected items . To download to your device, go in the cloud tab and press 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.
9	How do I know if I have the latest version of Lia?	If you go to the Settings tab, under System Version, it will show you your current version and the latest version. 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?	All products are featured in Lia, including any new/updated products!
12	Where do I find product information/forms?	In Lia: You can find all forms and documents under the Documents tab

		In Producer's Corner: You can find forms under Forms and Applications.
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?	From the slide out menu on the left, open the Documents screen and choose the suitable Product Guide. You can also visit www.producerscorner.ca
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. 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
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 with Producer's Corner.
2	Do you have a demo account?	Yes! The username and password is: lia.test2013 You can create your own security question
3	How do I change my password?	Go to Producers Corner, log in with your current details, and then click on Change User Profile and on Change Password. The new password will work in Producer's Corner and in Lia.
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 www.producerscorner.ca . On the home page, under the login box, click on Forgot Username. Fill in your email address and it will be sent to you.
5	What happens if I don't remember my password or security question?	Go to www.producerscorner.ca . On the home page, under the login box, click on Forgot Password. Fill in your email address and it will be sent to you.
6	If I have logged in using my security question, how do I get my password?	Go to www.producerscorner.ca . On the home page, under the login box, click on Forgot password. Fill in your email address and it will be sent to you.
7	How do I log into my account?	Use the same username and password for Producer's Corner.
8	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 in to a profile for the first time.
9	How do I change my username?	You cannot change your username.
10	How do I change user accounts?	From the login screen, you can select the dropdown and select from created user profiles.
11	How do I change the language on the system?	You can change the system language from the Login page on the top right.

		You can change the system language inside Lia at any time by pressing the Fr, or En button on the top right.
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 Producer's Corner (producerscorner.ca) with the same username and password you use for Lia, and under Quick Links, press Production Report.
14	Where is my commission information? How will I get my commission?	Log in to Producer's Corner (producerscorner.ca) with the same username and password you use for Lia, and under Quick Links, press Compensation – Sales Force.

Submitting applications

	Question	Answer
1	How do I submit an application?	First, you will need to be connected to the Internet to submit your application. Under the Application Summary tab follow these steps: Step 1 Review the application, Step 2 Signatures, Forms and other Reminders and then Step 3, Submit the application.
2	How will I know if my application was successfully submitted?	You will receive in 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 section of the My Applications tab in Lia.
3	How do I check the status of an application?	If you login on Producer's Corner, www.producerscorner.ca , you can find status updates on the Quick Links menu to the right of your screen when selecting 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 of the screen. 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 My Applications section, under Submitted Applications. To find the applications sent more than 72 hours ago, log in the Producer's Corner and click on reports – Online Products to view applications.
6	How do I open a quote?	To open an application you have already worked on, go to the My Application section, find your application, and click Open.
7	Why can't I submit my application?	Lia may not be able to submit an application in the following situations: i. No Internet access: Please ensure your device is connected to the Internet and that the Internet connection is operating. If you are still unable to submit, check your

firewall settings to ensure they are not blocking Lia applications.

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.

ii. 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

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.

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.

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.

8	Why does it say I do not have internet access?	LIA is unable to communicate with Assumption Life, please make sure your firewall is allowing LIA. Norton, AVAST, McAfee and AVG known to cause issues.
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?	Click on the Add Life Rider button, located in the New applications tab. Then, simply enter the policy number and fill out the rest of the application.

Electronic signature process

	Question	Answer
1	How does the in person electronic signature process work?	Please read carefully the document explaining the steps: In person electronic signature process .
2	How does the non face-to-face electronic signature process work?	Please read carefully the document explaining the steps: Non Face-to-Face electronic signature process .
3	Are there any limits, i.e. face amount, product availability	No limits, it is available for all our products and for any face amounts up to 4 million

	for using the e-signature process?	dollars.
4	Do you have training for the electronic signature feature?	Yes, go to the section View our tutorials on lia.assumption.ca
5	How many Proposed Insureds can I have to use the electronic signature?	You can have up to 3 Proposed Insureds on a same application to use the electronic signature process. If you have more than 3 insureds on a same application, please use the traditional paper copy.
6	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 of our Declaration and Signature form available in Lia or on our producerscorner.ca .
7	Can we sign with any device?	For the in person electronic signature process, you can sign on a tablet, on a computer with the help of the mouse or a USB signing pad. For the non face-to-face electronic signature process you can sign on a tablet, on a computer with the help of the mouse or a USB signing pad, or on a Smartphone.
8	Can I use the electronic signature while offline or online only?	You have to be connected to the Internet to use the e-signature process.
9	Is an email address required to do the electronic signature process?	For the in person process, no email address is required. For the non face-to-face process, a unique email address for each signer is required
10	What happens if signers share the same email address when using the non face-to-face electronic signature process?	A unique email address for each signer is required for the non face-to-face electronic signature process.
11	What happens if the signers do not sign or forgets to sign when doing a non face-to-face process?	After 2 days, if the signers have not signed yet, you will receive an email asking to follow-up with them.
12	Do I need to send in additional paperwork after using the electronic signature?	No. The signed document is automatically sent to Assumption Life.
13	What's the process if I have one signer in person and a second one non face-to-face which are all on a same application?	We suggest that you use the non face-to-face process for all signers.
14	When will I (broker) have to sign?	Once all signers have signed their form, you will receive an email inviting you to click a link and sign the form.
15	What do I do if a signer contacts me (broker) saying that they haven't received the email invitation to sign or have deleted that email?	If you have not yet submitted the application, you can go back in the E-sign section and re-enter the emails of the signers to resend the email invitation. If the application has already been submitted, contact our technical support team at 1-855-863-6040 so they can resend the email invitation. Or you can choose to go ahead with the paper copy.
16	What happens if a signer clicks on the <i>Opt Out</i> button?	The process will be stopped for every signer. Read question 15 above for the next step.
17	Can a copy of the signed form be downloaded?	Yes, it can be downloaded once every signer, including the broker, has signed the form.

		All signers will receive an email with a link to download the pdf format.
18	Why can't I choose <i>Sign with a mobile device</i> (orange button) when using the in person process?	This feature was unfortunately not available at time of the launch.
19	What do I (broker) have to do once the signature form has bent sent to Assumption Life?	You have to go back in Lia and submit your application.
20	Will the paper version of the signature form still be available?	Yes, the paper version still exists. It was revised and condensed to fewer pages, so make sure to download the most recent version found on our producerscorner.ca

How do I reach technical support?	By email: lia@assumption.ca or by telephone: 1-855-853-6040
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