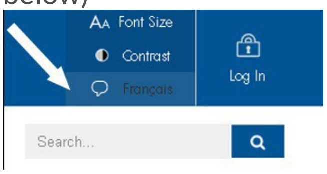
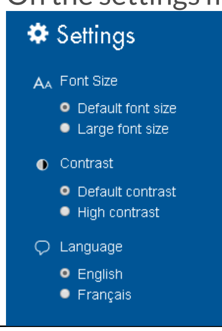
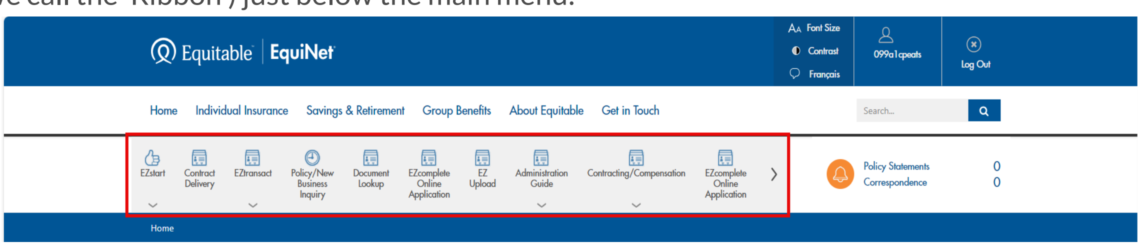
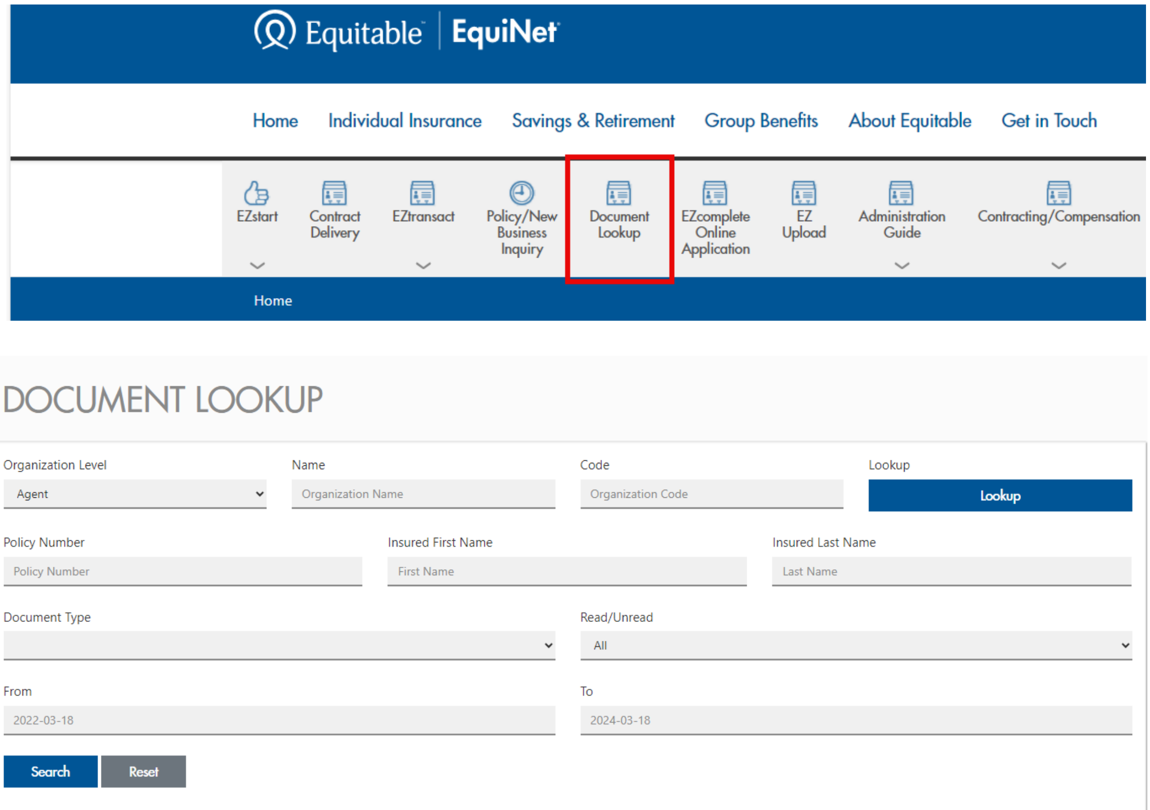
EquiNet

Frequently Asked Questions

Q	**How do I change the site language from English to French or vice-versa?**
A	On the top right corner, there are few site settings. Click on the language setting (as shown below)  On the settings menu, select the desired language. 
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	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:  *EZComplete, EZ Upload, Policy Inquiry, Document Lookup, Commission Statements, Compensation Inquiry, etc. are the EquiNet online tools

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 **<u>Document</u> 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.



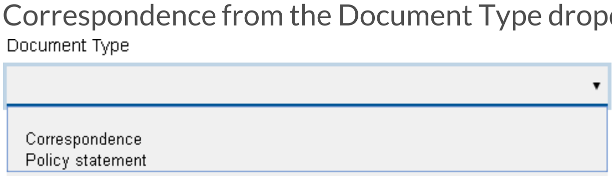
Q **How do I search for Policy Statements and Correspondence?**

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,

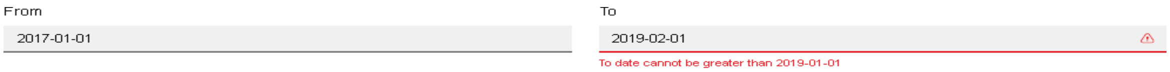
To search Policy statements ✰ Input Policy number or Insured name and select Policy Statement from the Document Type dropdown menu and click on Search.

To search Correspondence ✰ Input Policy number or Insured name and select Correspondence from the Document Type dropdown menu and click on Search.



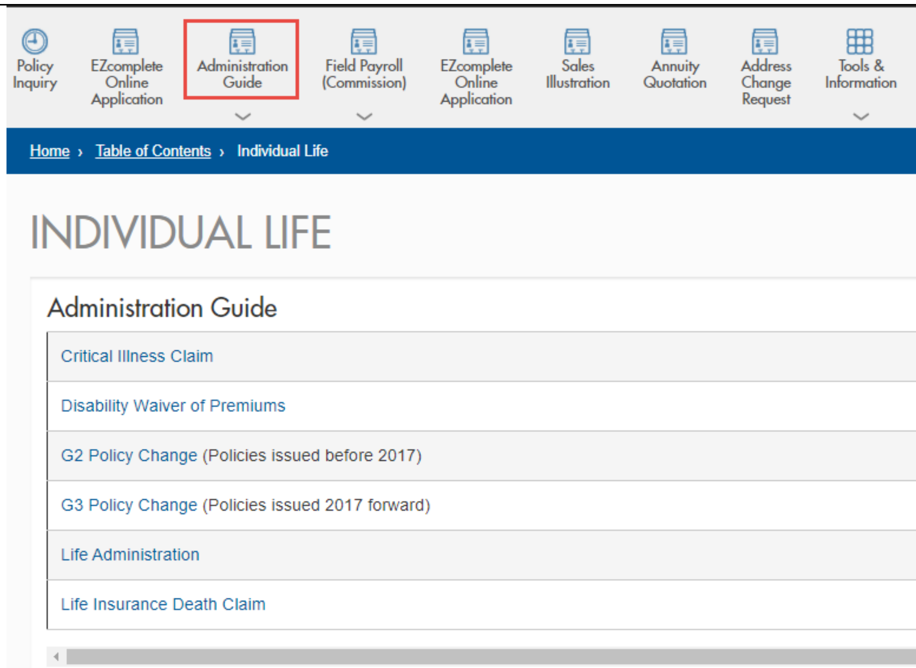
It is also possible to search by date range by selecting the Document type (Correspondence or Policy Statement) and providing a date range* (From and To date).

*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



Q **Where is the Admin Guide located?**

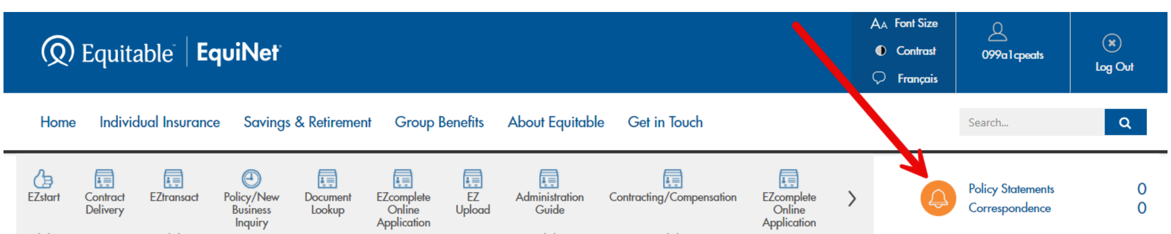
A



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

A The counts displayed are the

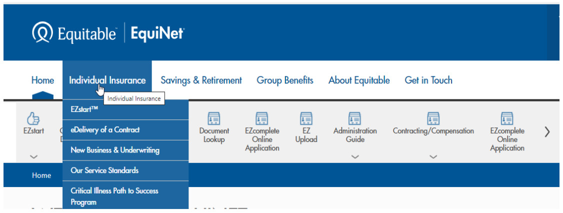
- Total number of policy statements generated in the last 60 days.
- Total number of Notices, Confirmations and Letters generated in the last 60 days



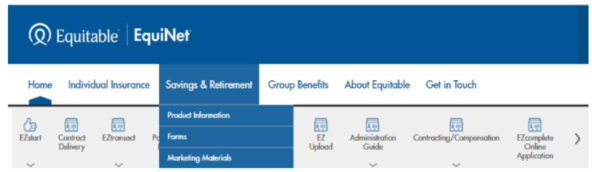
Q	**How do I access Forms (Individual Insurance, Savings and Retirement and Group Benefits)?**

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



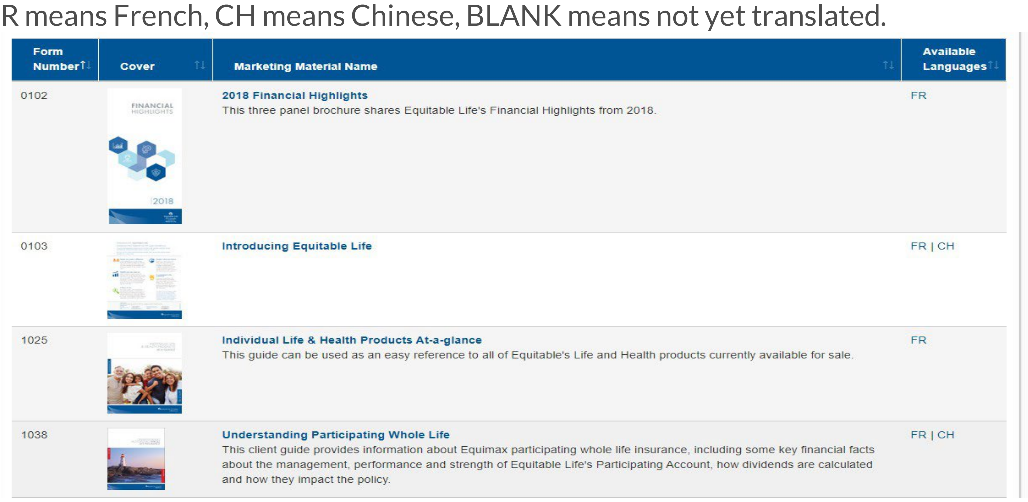
Group Benefits Forms

Q	**How do I view/download a French form?**

A 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, CH means Chinese, BLANK means not yet translated.

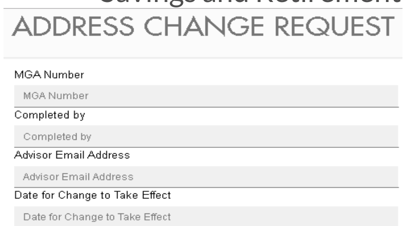


Form Number	Cover	Marketing Material Name	Available Languages
0102		**2018 Financial Highlights** This three panel brochure shares Equitable Life's Financial Highlights from 2018.	FR
0103		**Introducing Equitable Life**	FR | CH
1025		**Individual Life & Health Products At-a-glance** This guide can be used as an easy reference to all of Equitable's Life and Health products currently available for sale.	FR
1038		**Understanding Participating Whole Life** This client guide provides information about Equimax participating whole life insurance, including some key financial facts about the management, performance and strength of Equitable Life's Participating Account, how dividends are calculated and how they impact the policy.	FR | CH

Q **Where is the Address Change form?**

A You need to be logged in to be able to view/access the form. This form will available under

- Individual Insurance Forms
- Savings and Retirement Forms


ADDRESS CHANGE REQUEST

MGA Number

MGA Number

Completed by

Completed by

Advisor Email Address

Advisor Email Address

Date for Change to Take Effect

Date for Change to Take Effect

Q **How do I submit a request for support?**

A You need to use the EquiNet Support Form.

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

a) Login screen or

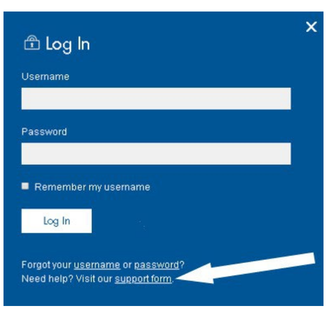
b) Site footer

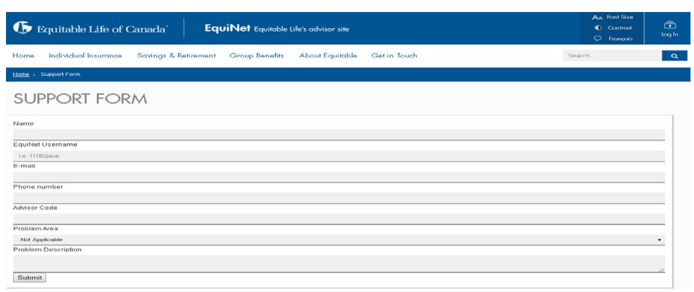
For a Logged-in user, the support form can only be accessed from the Site footer

<u>Accessing the support Form via Log In screen</u>

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'.

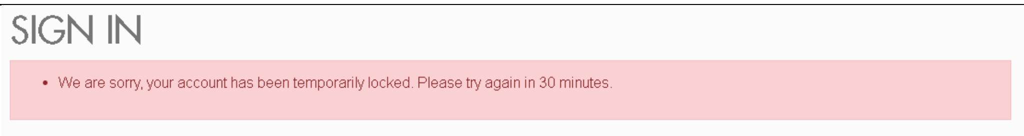
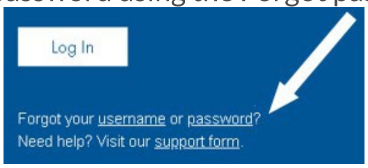
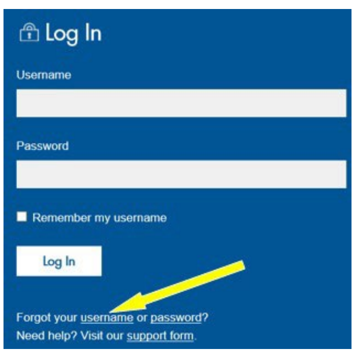




Q **Why does my account get locked?**

A As a security measure, the EquiNet account gets automatically locked temporarily after 5 failed login attempts.

A failed login attempt is when a 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**.

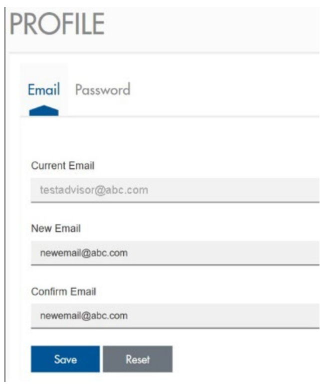
<table>
<tr><td></td><td>
</td></tr>
<tr><td>Q</td><td>How can I unlock my account?</td></tr>
<tr><td>A</td><td>As the message suggests, the lock only lasts for 30 minutes, and the user will be able to login again after this time.
However, if the user needs to get access to his/her account sooner, it is possible to reset the password using the Forgot password link from the Log In page.

</td></tr>
<tr><td>Q</td><td>My account is disabled. Can you help?</td></tr>
<tr><td>A</td><td>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 <u>equinetsupport@equitable.ca</u>.
2. The account will then need to be reviewed and enabled by the Producer Contracting staff.</td></tr>
<tr><td>Q</td><td>I forgot my username. Can you help?</td></tr>
<tr><td>A</td><td>The username can be recovered by the user by clicking on ‘<u>username’.</u>

</td></tr>
</table>

Q **How do I update my email address?**

A 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 a confirm email. Click Save.

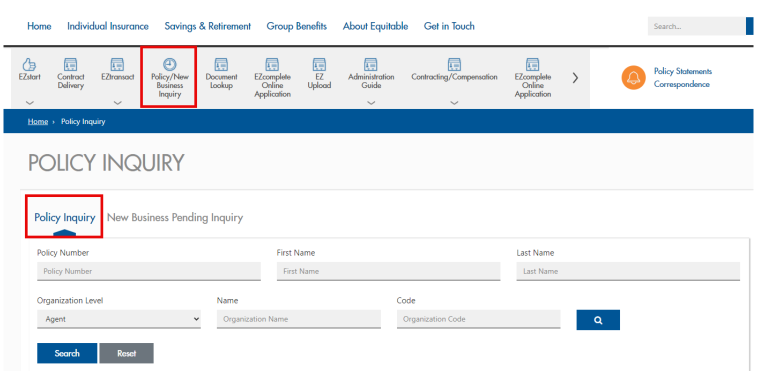


Q **Is there a mobile site for EquiNet?**

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.

Q **Can I apply for a loan through EquiNet?**

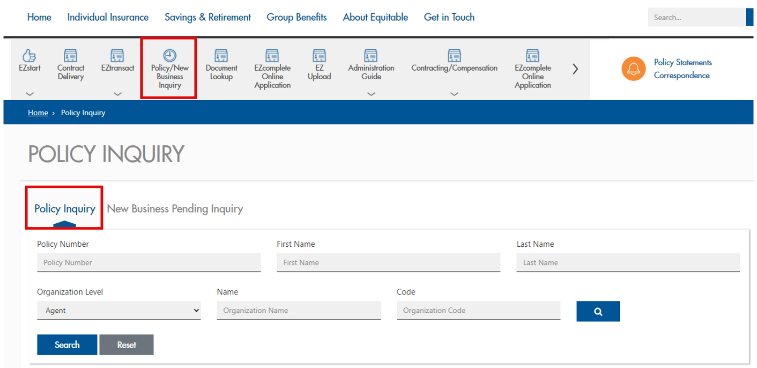
A Yes, if you have a Whole Life policy with a cash value. Click on Policy/New Business Inquiry. Under Policy Inquiry enter the policy number.



The Equitable Life Insurance Company of Canada
One Westmount Road North P.O. Box 1603 Stn. Waterloo,
Waterloo, Ontario N2J 4C7 **tf:** 1 800 722 6615 **equitable.ca**

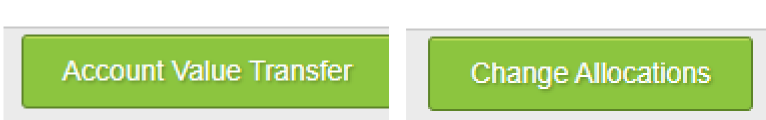
<table>
<tr><td></td><td>Click on the values tab, click the loan request button.


</td></tr>
<tr><td>Q</td><td>Can I request a transfer or Reallocation through EquiNet?</td></tr>
<tr><td>A</td><td>Yes, if you have a Universal Life policy. Click on Policy/New Business Inquiry. Under Policy Inquiry enter the policy number.



Click on the Investments tab.

Select Account Value Transfer or Change Allocations.


</td></tr>
</table>

The Equitable Life Insurance Company of Canada
One Westmount Road North P.O. Box 1603 Stn. Waterloo,
Waterloo, Ontario N2J 4C7 **tf:** 1 800 722 6615 **equitable.ca**