eVision Insurance Illustrator™

Q&A

Following are a list of common questions that advisors may have when using the new eVision Insurance Illustrator from Empire Life.

The Q&A is broken down by categories to simplify finding the information and answers you need quickly.

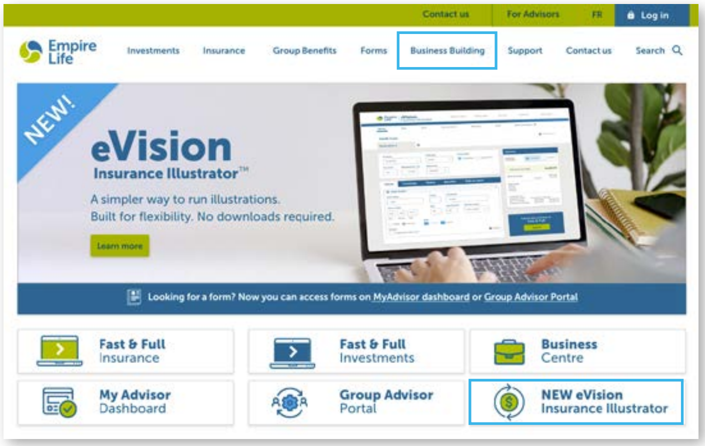
Access eVision Insurance Illustrator

How can I access the new eVision insurance illustrator?

Starting June 22nd, there are three ways that you can access our new eVision Insurance Illustrator:

1. Through the Empire Life advisor portal menu: **select Business Building > then Tools > then eVision.**

   As you have already logged in using your portal ID you will not need to log into the insurance illustrator platform. This way of doing things ensures an optimal experience and gives you access to all tools.



2. The new platform can also be accessed from any Internet enabled device at the following URL: evision.empire.ca.

   If you access the platform through the URL, you will first need to log in with your Empire Life user name and password.

   *You can add the URL to your favourites from the eVision Insurance Illustrator platform's home page. Do not create it from the login page.

3. By starting a Fast & Full® life application, you will automatically access the eVision Insurance Illustrator during Step 2 of the application process.

Where do I get a user ID and password?

Your user ID and password will be the same one you use to access any Empire Life properties: for example, Fast & Full, Business Centre, Portals etc.

I don't remember or I don't have an Empire Life online account user ID

If you don't remember your online account user ID and password, you can:

- use the self-serve feature or
- contact 1 866 894-6182 for additional support.

If you do not have an Empire Life online account user ID, contact your MGA who can assist you in submitting a request for an Empire Life online account user ID.

I don't have an Empire Life advisor code but want to run a quote, how do I do that?

eVision can only be used with an active advisor code. You may request one or alternatively you can use our Envision illustration software for a short period of time.

Envision desktop and web versions

Will the current Envision desktop version still be available?

Yes. We want to give you sufficient time to become familiar with the new platform while continuing to use the old illustration desktop software as required.

The current Envision illustration software is available for download under the Business Building/Software Downloads tab of the advisor site. empire.ca/advisor/business-building/software-downloads/envision

How much longer can I use old product illustrations to complete my current files?

We will continue to accept illustrations produced from the current **Envision desktop software (version 13.0.0.1) until October 31, 2022**, as we are cognizant of the fact that advisors may have a number of saved illustrations with the intent of revisiting a client file in the near future and a saved illustration makes it simpler if they want to save age. At Empire we also understand the need to be flexible in allowing advisors the time to migrate to our new illustrator tool.

Can I use any of my saved Envision illustrations with eVision?

No, unfortunately the systems are not compatible. As of June 22nd, you have the option to submit an existing Envision illustration as a paper application or, you can restart the application electronically using eVision.

Is there a way of accessing the new illustrator without an online account ID (i.e., do you have Guest access)?

No. Guest access functionality is not currently available but Guest Access will be available later in the year.

eVision can only be used with an active advisor code. You may request one or alternatively you can use our Envision illustration software for a short period of time.

Saving an illustration

Will I be able to save a PDF report of an eVision illustration?

Yes. You need to have the illustration report open and select “Save as”. You’ll have to select the folder where you want to save it. The method for saving the report may vary from one browser to another.

Will I be able to retrieve an old illustration with the new insurance illustrator platform?

No, any saved illustrations whether in Envision desktop or in Fast & Full will not be ported over to the new eVision Insurance Illustrator platform.

It should also be noted that saved illustrations within our new eVision insurance illustrator platform can be retrieved for up to 6 months (the maximum period for saving the age). After 6 months, the illustration will automatically be deleted from the platform.

Will the new insurance illustrator allow me to open a saved illustration and see the old premium?

No. The new illustrator won’t let you calculate a premium using an old product or a product’s old rates. The eVision Insurance Illustrator always shows the current rates.

To run an illustration using old premium rates, contact our Sales Support at **1 866 894-6182 and select option 2 to speak with a sales associate.**

Offline capabilities

Can the new Illustration software be used offline?

No. As eVision Insurance Illustrator is web-based, you no longer need to download and work offline. However if accessing the Internet is difficult for you as a result of remote areas, our desktop version of Envision remains available for a limited time. This will enable you to run your illustrations offline. Offline eVision capabilities will be part of a future release.

General

How will I be notified when there’s a change to eVision (e.g. premium rate change)?

You’ll receive an email communication from Empire Life notifying you of any upcoming changes to premiums or insurance products, along with the effective date of the change. The new illustrator platform will change the premiums automatically on the effective date indicated. Once the premiums have been adjusted in the platform, the old premiums can no longer be accessed through the illustrator platform.

Which products can I illustrate in the new eVision Insurance Illustrator tool?

All Empire Life individual life and health insurance products are available on eVision.

Will I be able to access the new Illustration platform with a tablet?

Yes. The new illustrator can be accessed on both android and iPad tablets. Because it is a mobile optimized, responsive design, it can also be accessed on a smartphone.

Can an illustration be assigned to my assistant and then be assigned back to me?

No. This functionality is not currently available.

If this is functionality that you find beneficial in your practice, Empire Life is always seeking feedback to determine how to improve our tools. Speak to your Account Executive on future features that you’d like to see.

Can my assistant access eVision if they have a UserID for Empire's portal?

Yes. Please note that a user does not need to have active licensing to access the Portal but they do need active licensing to access the full version of eVision. If there is no 'Advisor Role' associated with their login, they will only have limited access (for example, they cannot submit to F&F as an active license is required to submit an application).

Key differences between eVision and Envision

What's the difference between eVision and Envision?

Building off the success of our Envision illustrator, not only will advisors have access to all the same great capabilities that they've come to expect from Envision but we've given them even more. Launching June 22nd, 2022, additional enhancements include:

- Automatically launching two input screens for joint or multi-life policies on the same tab
- For business insurance cases, we've added the popular custom report page: Detailed Life Insurance Taxation Summary to our Solution Series product portfolio based on feedback from advisors using this feature with our PAR products
- Corporate Owner is identified earlier in the illustration process
- A redesigned user interface that follows modern design principles and delivers a simple, fast and easy user experience
- Modern, easy-to-read client reports that can be easily explained to clients, even over the telephone
- Auto populating the maximum marginal or corporate tax rate by province depending on the ownership type selected
- Real time summary calculation refreshes with changes to illustration inputs
- Providing solve calculations for coverage amount or premium

Plus, eVision is a web-based application so there are no installations or downloads required. That means software updates are automatic, and you are always using the latest version.

And remember you can access eVision from any device or operating system, whether iOS or Windows. All that's needed is a modern browser (e.g. Chrome, Safari)!

Changes to advisor information in eVision

I noticed that my personal contact information is incorrect. Who do I contact to update my information?

You can contact our Contracting division at contracting@empire.ca to request that your advisor information be updated.

Please contact your Account Executive or the Sales Centre at 1 866 894-6182 with additional questions you may have.

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The Empire Life Insurance Company
259 King Street East, Kingston, ON K7L 3A8 • 1 877 548-1881 • info@empire.ca • empire.ca

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