Administrative Tips: Use Digital Tools

Submitted by Victoria on May 19, 2020 - 3:48pm

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Use Digital Tools

In this edition of Administrative Tips, we talk about **priority items to better help advisors work with electronic solutions rather than non-digital**. Paper apps with paper cheques result in the need for people to have to deal with it and go to a bank.

Since COVID-19, most insurance companies and Global are working remotely so the staff isn?t necessarily at the head office to handle the paper so **everything ?paper? causes a delay in your business**. We all have had to adapt our client communication methods to make contact and get things done effectively and efficiently without face-to-face contact or paper contact. **See below for ways for non-cheque options**. When delays occur, Global can not guarantee T+2 processing on investment trades. **See below for options within VirtGate for advisors to process trades.**

We expect our industry changes and adaptations to continue for many months, so we provided training for our advisors to make progress and be comfortable with the new normal for client contact. We hope you?re rounding the corner to make contact with your clients, virtually. **We?ve encouraged all advisors to have online (virtual) client meetings as that is one of the ?new normals? for your business.** Online (virtual) client meetings (ex.Zoom or GoogleMeet) is the method to carry on with client meetings. If you need assistance with tools such as Zoom or GoToMeeting, please call Global?s Sales Team for help to set up your account and get a demonstration.

Here are some tips to use when working with your clients. Remember, both Global staff and carrier staff are often working remotely and therefore not in the office to answer the phone or process paper apps or cheques. We suggest working with Global?s sales team to find a way to achieve electronic business processes.

1. **Applications** ? when available from the carrier, always use an eApp instead of paper. eApps are underwritten by carriers before all paper apps.
2. **Collecting payment or making Additional Deposits** ? always use PAC or PAD or credit card forms. With the carriers? staff working remotely, they do not have employees going to the bank to deposit client cheques. Many carriers have options on their website for additional deposits when client banking is on file.
3. **O/S underwriting requirements** ? when providing details on pending cases, email your Global Account Manager with the information.
4. **Instructional emails to Global** are especially required when advisor has sent an investment transaction via eApp directly to an insurance company and then advisor sends Global a copy for records only. In situations like this, the note helps know not to process it again, causing duplicate transactions and affecting negatively on clients. Correcting duplicate transactions causes extra admin work and there may be a carrier charge to the advisor when a Letter of Indemnity is required.
5. **For training assistance with eApps, eDelivery, etc and carrier features contact Krishan** (krishan.mayer @globalpacific.com). Kris will assist you rather than your Global Account Manager.
6. **Login to VirtGate** to view the status of your clients? underwriting on the ?Requirements? page. Continue to use VirtGate to upload client Documents, add Journals, and send Secure-Emails. All emails from VirtGate capture automatically in the Journal.
7. **Forward client claims correspondence to new email address,** claims @globalpacific.com ? On Life and Living Benefit claims, Global plays the role of information sharing between client and carrier. We are the liaison only. The claims department at each carrier will determine additional requirements and generally they communicate directly with the client (or advisor) making the claim. Sometimes clients making a claim will deal directly with the carrier claim department, sometimes with the advisor, and sometimes they contact Global Pacific for assistance. If you need assistance with initial requirements for any claim, Global can assist and the requirements vary depending on the carrier.

Global has a new email address so advisors can help us streamline the claim queries and documents. Please use email claims @globalpacific.com rather than your Account Mgr.

1. **Advisors are required to login to carrier websites** for so many things, like eApps, insurance forms, and inforce client notices. Advisors must obtain their own login to the contracted carrier websites if not already in place. Contact the sales team if you need assistance, **Kris** at krishan.mayer @globalpacific.com.

Reminder: IA Financial is the most recent carrier to only provide advisor copies on inforce notices on the advisor login for all client late payment, NSF, and other client notices for advisor to obtain. The advisor must login to be aware of inforce notifications on their clients.

1. **Contact Global by email using our streamlined email addresses below**. This

helps Global organize the work advisors send us and speeds up handling:

- delivery @globalpacific.com - for delivery / settling requirement documents
- investments @globalpacific.com ? for all investment trades, switches, redemptions, corrections
- inforce @globalpacific.com ? all inforce service (change bene, owner, premium payment, late payment offers, etc.)
- claims @globalpacific.com ? all life and living benefit claims correspondence
- contracting @globalpacific.com ? all advisor contracting, licensing and E&O
- compliance @globalpacific.com ? all advisor compliance queries, complaints

1. **Contact Global if you, as the advisor have interest to process client investment trades, switches, etc.** Advisors may choose to work within the agreement for Electronic Order Processing. When an advisor signs the agreement, additional VirtGate training is provided.

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