

Frequently asked questions | iA-iAE sales experience harmonization

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Access to tools

Q: How do I access Assure&go as of February 1?

You can access Assure&go via iA's [secure Advisor Centre](#) or use the direct link to the [Assure&go website](#). Please note that the look of the login page has changed.

Secure Advisor Centre: Once connected to the secure Advisor Centre, you can access Assure&go via the "My tools and applications – Assure&go" menu. On the Assure&go page, click on the "Access Assure&go" button on the right.

How? [Refer to the "Get access" procedure](#).

Direct link: To login to [Assure&go](#) via the direct link, you must use your Advisor Centre login information.

Q: Which advisor code do I use?

Your iA code: Your **iA code** is now the code to use for applications available to you, including Assure&go.

For all paper sales, both for iA and iAE products, you must use your iA advisor code.

Your iAE code: Your iAE code is no longer used for new business but will be displayed in your existing files.

Q: How do I get access to Assure&go for the first time?

To get a new access to Assure&go, you must have secure access to the iA [Advisor Centre](#). See the [next question](#) for how to get a secure access to the Advisor Centre.

Q: How do I get access to the secure Advisor Centre for the first time?

If you don't have access to the secure Advisor Centre, follow these quick steps:

1. Click on the following link:
<https://iaa.secureweb.inalco.com/WEMWPN46/Inscription/IdentifierRepresentant>
2. Follow the instructions
3. Get your secure access!

Forgot your access code or password? [Get them here!](#)

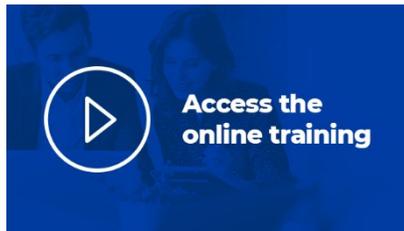
Q: What do I do if I lost my access to the Assure&go demo site?

In compliance with best operational practices, access to the demo site is no longer available. The members of your teams that had access to the demo site must now use the live Assure&go site via access delegation.

To delegate your Assure&go access, see the question [“How do I delegate my Assure&go access?”](#)

Do you use Assure&go for training purposes?

Good news! We have created an online training program which includes several one-minute to three-minute videos. Find out more:



Q: What do I do if I lost my access to Vision-R?

We apologize for this situation. Please contact us:

- Client and partner contact centre: 1-800-465-5818

Delegation

Q: How do I delegate my Assure&go access to members of my team?

To **grant Assure&go access** to members of your team, you must now do it in the secure [Advisor Centre](#), under the “My tools and applications – Delegation” tab.

How? [Refer to the “Delegate my access” procedure.](#)

Q: What if some of my delegations have been revoked?

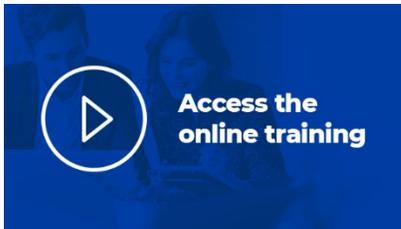
We apologize for this situation. There are two options available to you:

- Option 1: Avoid delays by quickly creating your delegations again. Go to the secure [Advisor Centre](#), under the “My tools and applications – Delegation” menu.
How? [Refer to the “Delegate my access” procedure](#)
- Option 2: Contact us at the IT Help Desk: 1-888-610-5101

Training

Q: Where can I find training on Assure&go?

You can access the [online training program](#) or download the [user guide](#) by clicking on one of the following links:



My compensation

Q: Where do I find my compensation reports?*

Before September 21, 2020: Former iA Excellence reports are still accessible through **Vision-R**. iA reports are available through the secure [Advisor Centre](#).

Your **Vision-R** access code and password remain active so you can consult your old reports.

Since September 21, 2020: Data on new sales of former iA Excellence products is included in existing iA reports. These integrated reports are accessible in the secure [Advisor Centre](#) under “My tools and applications – Compensation”.

* For those with access to the COMPENSATION feature in the **Advisor Centre**.

Q: Who should I contact for questions about my advisor contract or my compensation?

You may contact the sales network compensation team:

By phone: **1-800-465-5818**

By email: Contracting: agentcontract@ia.ca

Compensation: Sales.Compensation@ia.ca

Transfers: Transferts.IRA@ia.ca

Where to find...

Q: Where do I find my reports* and tools?

BEFORE	NOW		
Vision-R	Assure&go (since May 29th, 2020)	Advisor Centre (since Sept.21st, 2020)	Vision-R
Statement of Account (compensation)		Compensation*	
My Electronic Submissions	My business - Electronic applications PDF		
Contracts Being Processed	My business - Applications and policies summary		
Policy Search	My business - Policy search		
Renewal Follow-ups	My business - Reports		
Reminder Notice	My business - Reports		
Negative Reserves		Compensation*	
Retention Rate		Compensation*	
Distribution by product			Distribution by product

* For those with access to the COMPENSATION feature in the Advisor Centre.