eDocs from Irish Life – frequently asked questions

eDoc notifications - paperless and alert settings

- There are three or four documents which I cannot change settings for – why is this?
  These documents have not yet been included in the paperless functionality. They are:
  new business cancelation – refund letter;
  new business revenue requirements letter;
  risk claim letter.

- I am unable to update paperless and alerts settings, but another user in this office is - why is this?
  Permission to update alerts depends on you b-line logon settings. These permissions can be changed by the Irish Life service desk. The service desk can be contacted on 1850 29 89 89.

- If I update alerts or contact settings how soon the will changes I make take effect?
  The minimum is one working day but it may be up to two days depending on the timing of the updates on Irish Life's systems.

- I can't switch-off paperless for annual benefit statements - why**?**
  Copies of ABS for brokers have only been delivered electronically for some time now and this practice continues under eDocs.

- If I leave paperless switched-on what happens to letters that have cheques attached?
  Cheques will always be on paper.

- If I elect to receive an original policy schedule for a policy, will I need to switch paperless off to receive a paper document?
  No - the original policy schedules will always be delivered by post.

- I have left everything paperless, but have just received post from you - why is this?
  eDocs currently only deals with 'system generated' correspondence. A separate project in 2011 will implement eDocs for letters outside our bulk processes.

- I used to get underwriting special terms letters by email but these seem to have stopped - why?
  Special terms letters are now only available as eDocs. You can set up email alerts for these documents in eDocs notifications.

- Can I be alerted for persistency related items?
  You will be able to receive alerts in quarter one 2011.

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- Can other people change my settings?
  eDocs settings are stored at agency code level. So anybody with a b-line id that has access to a particular agency code can alter the settings. The broker who owns a particular agency code may request that this facility is restricted to particular b-line ids. This can be done by calling the Irish Life service desk at 1850 29 89 89.

Client/plan notifications

- What events will I be notified about?
  The creation of any of the 26 document types listed in eDocs notification page.

Copy/original policy schedules

- Why have I received a copy policy schedule when I have always received the original policy schedule in the past?
  The default now is to send the original schedule to the customer. If you wish to receive the original schedule you may specify this preference for each new policy at policy entry stage on bline.

Viewing documents

- Can I download batches of documents to my own system?
  No. Each document must be viewed and downloaded separately.

- Who can see my documents?
  All users with access to your agency code can see your documents.

- I can't see letters sent to my customers after January 2011
  You will only see letters addressed to you from 2011 – copies of customer letters. Letters visible prior to go live will remain visible.

- My recent document list does not show items produced last week - why?
  This will build up over the first two weeks that the system is live.

- What does the 'x' symbol against some documents mean?
  This means that a "sign and return" form is included in the document

Alerts

- I didn't receive alerts although I have them turned on - why?
  On the b-line notifications page, check that the email and/or mobile details supplied are valid.

- I got a text alert with no details of what documents were available - why?
  For your convenience, if more than five text alerts ready to send we will send a generic text message instead of sending multiple individual messages.

- Can I reply to text and email alerts?
  No, you will not be able to reply to the text or emails received.

- How soon will I get an alert after a document has been created?
  Documents are created at 10:00, 12:00, 16:00 and 18:00 - the associated alerts are sent within an hour of the documents being created.

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