



ACCESS | advisors

# SSQ is just a click away



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# Access to SSQ, whenever and wherever you need it!

Our **ACCESS | advisor** Web site offers a number of functions to help you with such things as renewals, statistical reports, contractual documents, etc. It also provides up-to-date information that will help you manage all of your group insurance files.

And the reason for all of this is to enable you to focus on what's essential, which is, of course, your business!

## Gaining access to the Web site

Simply go to **ssq.ca** and click on the **LOGIN** button. Then, click on **Group insurance - ACCESS | advisor** under the **ADVISOR** section. The first time you visit the **ACCESS** Web site, you will be asked to enter the username and password that SSQ has given you. You will also be asked to read and agree to the terms and conditions of use for the site – a step only required the first time you log on to the site.

SSQ insurance

Français

access

Advisors

1 >> Identification

2 Username

☐ Remember my username

3 Password

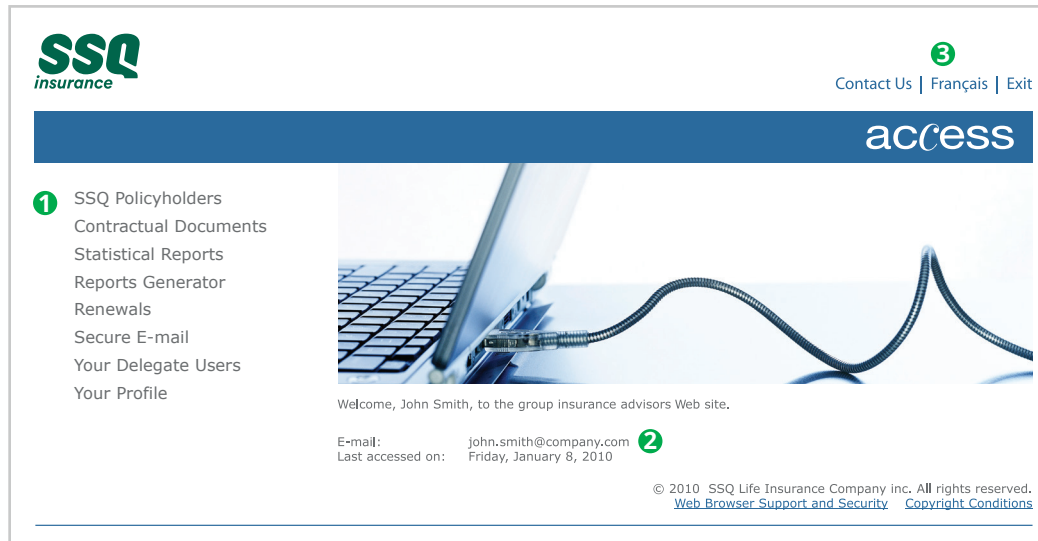
[Retrieve my password](#)

Login

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[Web Browser Support and Security](#) [Copyright Conditions](#)

- 1 The first time you visit the Web site, you will be asked to change your temporary password to a password of your own choosing.
- 2 The *Remember my username* function enables your computer to memorize your username which allows you to save time logging in. This function is secure, but optional.
- 3 If you forget your password, you can retrieve it at any time by clicking on this link. Then simply follow the instructions and answer one of the three security identification questions that you will have chosen previously.

# Home Page



- 1 The main menu is accessible at all times while browsing on the Web site. For security reasons and to meet technological standards, we strongly recommend that you browse our Web site by using links provided, rather than clicking on "Forward" and "Back" buttons.
- 2 You can change your e-mail address under the *Your Profile* section.
- 3 The **ACCESS** Web site is available in both English and French. Please note however that whenever you change the display language, you will be returned to the home page.

# Your Profile

The *Your Profile* section enables you to manage your **Access** account and update information related to your user profile, including your password, general information and subscriptions. You can also manage your subscriptions to the e-mail notices you receive when new files become available on the site. The first time you log on to the Web site we recommend that you verify the accuracy of the information displayed in this section as it is partially based on data in our systems but changes may have occurred for which we have not yet been notified.

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**Your Profile**

**Your Profile**  
Please enter the information required to change your profile

1 General Information Change your Password Change your Security Questions Manage your Subscriptions

Company: ABC COMPANY

2 First Name: John

Last Name: Smith

Language preference: English

Gender: Male

E-mail: john.smith@company.com

Telephone: Ext.

Cancel Submit

- 1 Different tabs enable you to view and update the information contained in your ACCESS profile, change your password and identify preferences regarding e-mail notification subscriptions.
- 2 You can change your e-mail address here. Simply enter your new address. It is important to keep your e-mail address up to date because SSQ will notify you every time a document is deposited for you on the Web site or when you make a change to your user profile. Do not forget to click on *Submit* before changing tabs otherwise your changes won't be saved.

# Your Profile (con'd)

## Your Subscriptions

You are automatically registered to receive renewal and quote notices by e-mail. However, if you wish to be notified of other types of documents deposited for you on the **ACCESS** Web site, you must create subscriptions based on your preferences. To create a subscription, simply click on the *Add* tab under *Manage your Subscriptions* and enter your personal preferences. You can also click on the *Subscribe* button in each section.

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**Your Profile**  
Please enter the information required to change your profile.

General Information | Change your Password | Change your Security Questions | Manage your Subscriptions

**Create a Subscription**

- 1 Publication: Contractual documents
- 2 Notification frequency: Weekly
- 3 Policy: 98300 - ABC Company

Cancel Subscribe

- 1 You can register for renewal notifications, contractual or quote documents and statistical reports by selecting the type of publication from the drop-down menu.
- 2 You must select an e-mail notification frequency for each type of document. We recommend that you select the "immediately" option, but you can also select a daily or weekly frequency if you prefer.
- 3 You can create a subscription for one specific policy or for all of your policies. If you opt for a subscription for all of your active policies, please note that any policies added at a later date will automatically be taken into consideration.

# SSQ Policyholders

The **ACCESS** Web site allows you to view your list of clients with insurance contracts in force and, with just a click of your mouse, all of the information you need to be able to easily manage and follow up on your files. Only clients for which the **ACCESS** rights have been granted will be displayed.

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SSQ Policyholders

This information is accurate as of 2010-04-02.

You can filter the list by indicating either the policy number or policyholder name in the Filter field.

1 Filter by Policyholder

2

3

KLM

Policyholder	Effective date	Renewal date	Renewal notification
Policyholder 98300 ABC COMPANY	2008-01-01	2010-01-01	2009-12-01

Policyholder 98300 ABC COMPANY

Contact: 98300 - ABC Company

Telephone: 416-234-5678

You can also filter the list by indicating either the group number or group name in the Filter field.

Filter by Group:

98300 ABC Company

98301 KLM Company

Group Details ABC Company

Effective Date

2008-01-01

Number of Participants

236

Class(es)

1. Active Employees

2. Retirees

3. Managers

- 1 Search filters enable you to target your searches to get the information you need more quickly.
- 2 By clicking on the title of a column, you can sort search results in ascending or descending order.
- 3 To obtain details about a policyholder or group, simply click on the corresponding line. The information will be displayed in the *Details* section, at the bottom of the table.

# Contractual Documents

The *Contractual Documents* section enables you to display and download documents of a contractual nature related to the policies you manage. The number of documents available will increase in the future as more documents are processed and transformed into electronic format.

A list of all your active SSQ policies will appear automatically. You can filter the results by entering a keyword included in the policyholder's name or a policy number in the *Filter by Policyholder* field. You can also sort search results by clicking on the title of the column.

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**Contractual Documents** [Subscribe](#)

98300 ABC Company

Document	Description	Effective date	Language Preference	Produced on
Booklet	Permanent Employees	2008-01-01	English	2010-05-22
Booklet	Managers	2008-01-01	English	2010-05-22
Booklet	Retirees	2008-01-01	English	2010-05-22

3 Document(s), total Size : 75 ko


[Download All](#)

- 1 A complete list of all documents available on-line for the policy you have selected will appear as well as basic information such as the effective start date, the language (English or French) and the production date of the document.
- 2 You can download contractual documents by clicking on the icon corresponding to your file format preference (PDF, Word, etc.). If two or more documents appear in the table, the *Download All* button will appear, enabling you to download all documents in a zip file (.zip) with a single click.



# Statistical Reports

The statistical reports you receive are available on the *ACCESS* Web site. In addition, you can personalize these reports by using the *Report Generator* application. Reports are available in PDF format and now some documents will also be available in Excel format, making it easier for you to work on the data.

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### Statistical Reports

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1

Report Generator - Requests in progress

Request No.	Description	Date	Status
124	S02 - Policy 98301 - EN - XLS	2010-06-09	Submitted
123	S05 - Policy 17321 - EN - PDF	2010-06-06	Submitted
122	S15 - Policy 16099 - EN - PDF	2010-06-04	In Progress
121	S04 - Policy 16090 - EN - XLS	2010-05-23	No data

2

Policyholders

Filter by Policyholders:

Policy	Policyholder	Effective Date	Renewal Date	Renewal Notification
98300	ABC Company Inc.	2008-01-01	2010-01-01	2009-12-01

- 1 This section allows you to verify the status of the reports you request with the *Report Generator*. There are three possible request statuses, as shown below:


**Submitted:** our systems have received the request.  
**In progress:** the report is currently being generated.

**No data:** there is no data available to generate the report that meets the required criteria; this status will remain displayed for 48 hours.

Once a report has been generated, the request will disappear from the table. You may then consult the report in the *Policyholders* section. When all of the requested reports have been generated, the *Report Generator* section will disappear.

- 2 The *Policyholders* section displays a list of the insurance policies that are currently in force. Simply select a policy to consult the statistical reports available related to it. You can filter the list of policies by entering a keyword or policy number in the *Filter* field.

# Statistical Reports (con'd)



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98300 ABC COMPANY

1 End of Period 2010-09

Report	Group / Grouping	Language Preference	Produced on	
A02 Details of Readaptation Fees		English	2009-12-17	
A02 Details of Readaptation Fees		English	2009-12-17	

6 document(s), Total Size: 75 Ko

Download All

3

- 1 Statistical reports are generated periodically. The most recent reports appear automatically; to display previous reports, simply select the desired date from the drop-down menu. To consult reports that have been requested with the *Report Generator*, select the end date of the period for the report to be generated.
- 2 You can download statistical reports by clicking on the icon corresponding to your file format preference (PDF or Excel).
- 3 Click on the *Download All* button if you want to download a zip file (.zip) containing all of the files displayed on the page.

# Report Generator

You can use the *Report Generator* application to request the reports you need by indicating, among other things, the payment period and the desired file format.

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**Reports Generator**

**S02 - Benefit Payments**

1 Report: S02 - Benefit Payments New 5

2 Language: English  
Period From: 2010-01 TO: 2010-02 YYYY-MM  
Format: PDF  
Selection Criteria: Policy Break Down by Group: ☐

3 Policy(ies):  
98300 - ABC Company Inc.  
98301 - DEF Company Inc.  
98302 - GHI Company Inc.  
98303 - JKL Company Inc.

Selected Policy(ies):  
98304 - MNO Company Inc.

Cancel

1 report(s) to submit  
4 Submit i

- 1 Select the report you wish to generate from the drop-down menu. The criteria used to configure reports will vary depending on the type of report you request.
- 2 Determine the criteria required to generate the report. The end date of the report is automatically the final date on which the data will be available in our systems.
- 3 Select the policies or groups for which you wish to obtain a report by using the clickable arrows to move them into the box on the right side of the screen. It is possible to select more than one policy or to select more than one group insured under the same policy.
- 4 When your request is ready, click on the *Submit* button. A message will appear at the top of the page to confirm that your request has been successfully sent or to inform you otherwise. You can request up to 20 reports at one time.
- 5 To request a different report, click on the *New* button.

# Renewals

It is possible to consult all of your contract renewals<sup>1</sup>, both current and previous, provided the client's file is still active. **ACCESS** automatically displays active renewals, i.e. files available up to two months following the renewal date. You can filter the list using a key word or a grouping number.

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**List of Renewals** [Subscribe](#)

1 Grouping number: 98300  
ABC COMPANY

2 Renewal Date: 2010-01-01  
Renewal Notification: 2010-12-01  
Release Date: 2010-11-15

Document	Description	Language Preference	
<b>Presentation</b>			
Letter to advisor		French	
Letter to policyholder		English	
<b>Analyse</b>			
Renewal specifications		French	
<b>Statistical Reports – Policy 58240</b>			
S02 - Benefits by clause		English	
S02 - Benefits by clause		English	
S05 - Disability insurance benefits per certificate		English	
S11 - Demographic evolution		English	
S15 - Premiums and benefits by coverage per month		English	

11 document(s), Total Size: 56.92Mo

[Download All](#)


- 1 Information provided regarding specific groupings is displayed at the top of the page.
- 2 You can consult documents related to previous renewals by selecting the corresponding date in the drop-down menu.  
As of April 2010, SSQ will be archiving all renewal documents. Eventually, you will have access to renewal documents dating back as far as five years.
- 3 All documents displayed form part of the renewal, regardless of choice of language or file format. You can consult any document simply by clicking on the icon corresponding to the format of your choice (Excel or PDF).
- 4 Click on the *Download All* button if you wish to download a zip file (.zip) containing all of the files displayed on the page.
- 5 The *Download all* button enables you to download a compressed (.zip) file including all the documents indicated on the page.

<sup>1</sup> As of April, 1 2010.

# Compensation

You can consult all your electronic statements directly on the **ACCESS | Advisors** Web site. In order to visualize these reports, you must be registered to Pre-Authorized Debit transactions.

Statements are available for compensations regarding both regular and specialized group insurance and are accessible for a period of 5 years.



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Compensation




ABC Company Inc.

Year

All years

Document Type

All documents

Year	Document	Statement Number	Description	Produced on	Payment Method	
2013	Group Ins. - Compensation Statements	11223333		2013-06-06	Direct deposit	Fr 
2013	Group Ins. - Compensation Statements	11223333		2013-06-03	Direct deposit	Fr 
2013	Specialized Group Ins - Compensation Statements	11223333		2013-05-28	Direct deposit	Fr 

# Your Delegate Users

You can create delegate profiles for members of your team to grant them a level of access that corresponds to their job functions. Once a delegate profile has been created, you will be given a username and a password enabling the individual to access the site.

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**1 Your delegate users**

Last Name	First Name	Account No.
Smith	John	xca05027
Hopkins	Jane	xca05102
Macalpine	Larry	xca05031

**3** Add

- 1** The *Your Delegate Users* section starts with a list of your delegates. The table provides basic information such as the delegate's first and last name, username, etc.
- 2** To obtain details about a delegate profile, click on the name.
- 3** To create a new delegate profile, click on the *Add* button and follow the steps indicated to grant the delegate access to the files and documents needed to fulfil their job functions. Once you have completed these steps, you will be provided with a username and a password for the delegate.

# Any questions?

## **Toronto Office**

110 Sheppard Avenue East, Suite 500  
Toronto ON M2N 6Y8

Telephone: 416-221-3477  
Fax: 416-221-2898  
E-mail: [contactcentre@ssq.ca](mailto:contactcentre@ssq.ca)

## **Montreal Office**

1225 Saint-Charles Street West, Suite 200  
Longueuil QC J4K 0B9

Telephone: 514-521-7365  
Toll-free number: 1-800-361-8100  
Fax: 514-521-1106  
E-mail: [bur.mtl@ssq.ca](mailto:bur.mtl@ssq.ca)

## **Quebec Office**

2525 Laurier Boulevard  
P.O. Box 10500 Stn Sainte-Foy  
Quebec QC G1V 4H6

Telephone: 418-651-7000  
Toll-free number: 1-800-463-3331  
Fax: 418-659-4675  
E-mail: [bur.que@ssq.ca](mailto:bur.que@ssq.ca)

**[ssq.ca](http://ssq.ca)**

