



UNDERWRITING

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Our pre-screening service is temporarily on hold

During this busy year-end season, we have decided to focus on turnaround times to respond to your requests more quickly and serve you better.

We have therefore decided to put a hold on our pre-screening service for the time being.

But remember: [our Pre-screening guide is now available](#) on Webi. The comprehensive guide is easy to use and gives you the tools you need to pre-screen clients yourself.

If you have any questions, please feel free to contact our Customer Contact Centre at 514 847 1313 / 1-866-847-1313, option 4.

Thank you for your understanding.

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Additional use of previous paramedical exam

Proposed insureds can now use a previous paramedical exam instead of filling out section *F6 – Supplementary Questions* of the insurance application.

Eligibility

- Proposed insureds must have previously been approved at standard rates (no substandard premium or exclusions) by Desjardins Insurance.
- The paramedical exam must have been done in the last 12 months (6 months for proposed insureds 65+).
- We accept paramedical exams done for Desjardins Insurance or other companies.
- The other mandatory sections of the *Evidence of Insurability* form must be completed.

Steps to follow

You may specify in the *Special Instructions* section of the insurance application:

- Use the paramedical exam done on *(date)* for contract *(number)* with *(Name of insurance company)*

Important

When issuing a contract, the *Evidence of Insurability* form will be included with the contract. It must be completed and signed by the policyowner(s) and insured(s) and returned to Desjardins Insurance for the contract to take effect.

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New PB Tools (pending business tracking tool) features

New indicator for pre-ordered requirements

Underwriting Requirements

Indicator(s)	Requirement	Status	Date Requested	Elapsed
▲	Blood Profile - HooperHolmes	In Progress	02/09/2016	46
Requirement Details				
Requested by	Sélection des risques/Underwriting			
Last update made by	Sélection des risques/Underwriting			
Requirement(s)	Blood Profile - HooperHolmes			
Action Required	-			
Pre-ordered requirement				
Status Change Date	02/09/2016			
Attachments				
No File				

As a result, there won't be any more notifications to this effect.

New "Policy issued" file status

The new status will be used to identify policies that have been sent to you and that require a Notice of modification, a Notice of premium payment or a Statement of good health to be returned to us in order for the policy to come into force.



Isabelle Plourde, Vice-President
New Business and Underwriting

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Desjardins Insurance refers to Desjardins Financial Security Life Assurance Company.