

**Read Only Agenda Item 7(d)
July 26/22 EOC Meeting**

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Sent: July-04-22 2:38 PM

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Cc: Keith Martin <Keith.Martin@cafii.com>

Subject: RE: Summary Notes From Wednesday, June 29/22 CAFII Online Focus Group With Yukon Government On Insurance Professionals Licensing Phase of Its Online Licensing Portal Project

Hi Brendan,

Thank you for forwarding this on. And thank you very much to Sandy for the notes, this is greatly appreciated.

I hope everyone had a wonderful long weekend!

Speak soon,
Spring



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Subject: Summary Notes From Wednesday, June 29/22 CAFII Online Focus Group With Yukon Government On Insurance Professionals Licensing Phase of Its Online Licensing Portal Project

Hello, Spring and Brad; and CAFII Member Representative Participants in the Wednesday, June 29/22 Online Focus Group With Yukon Government On Insurance Professionals Licensing Phase of Its Online Licensing Portal Project:

Sandy Prokop of RBC Insurance has graciously agreed to CAFII's request that her excellent notes from last week's meeting be shared with you, as a helpful summary and benefit to all who participated. Please see below, beneath my signature block.

On behalf of us all, thank you, Sandy.

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Summary Notes from Meeting of CAFII Member Reps. & Yukon Gov't.: June 29, 2022 regarding new online system

Yukon developing a new online system to launch in Fall 2023(expect launch June 2023 to include next year's renewal apps) and are taking feedback

Recommended for website:

General users/public

- display name; type of license; start/expiry dates, license number, Carrier representing
- search capabilities (NB site has good search functionality-don't have to enter full name, can use part)

Insurers:

- ability to report on who is representing Insurer
- ability to pull report to view status of licenses and if pending, why
- ability to export to XLS

PDF licenses issued to licensee

Payments:

- will do only credit card, no EFT
- ability to do bulk payments (identify who we are paying)

User Access:

- Authority roles
 - Access to initiate / review / pull reports / terminate
 - Authority to approve on behalf of the sponsor

- Admin access for specific Carrier – to create new access for staff/terminate access (rather than having to contact Yukon to provide)
- Ability to switch/toggle between various legal entities that user has access to (ie RBC Life vs RBC Insurance Comp of Canada vs Aviva General)

User portal:

- Ability to upload documents
- Accept MyBackCheck criminal report (and upload)
- Ability to return app to agent with notes/instructions
- Insurer Corporate licenses also managed on line

***License Renewal – once license is renewed and approved by Yukon, have the expiry date updated to the new expiry date rather than waiting to update the expiry date on the actual expiry date (Spring will look into this)

NOTES

- notarizations will not be required next year once portal launched
- Expect to go live with Renewals first, then transfers, before doing “new” applications (left over from previous meeting, didn’t reconfirm)
- Gov’t system so will be AODA compliant
- Asked for a potential API from Yukon to participating Insurers so licenses can be uploaded automatically??
- Asked for some type of notification if a license is canceled prior to expiry date?
- Offered to assist/test in a prototype

Didn’t get into details about Pending status’ and what those would be. This type of info is important to reduce email/calls between sponsor/Yukon.

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