

SELECTION PROCESS ADVISOR TASK

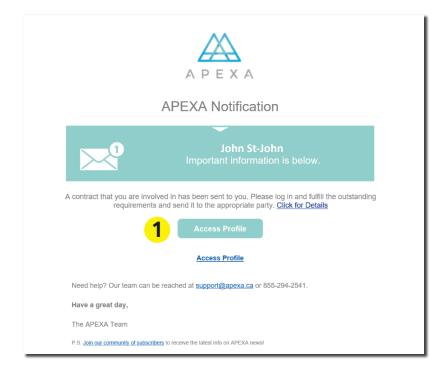
Completing and signing the contract kit



COMPLETING AND SIGNING THE CONTRACT KIT

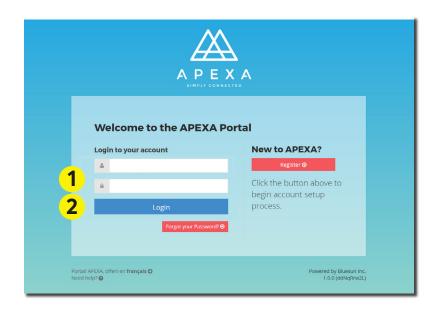
You receive an email from notifications@apexa.ca informing that there is a contract kit that needs to be completed and signed.

1 Click on Access Profile.



Log in to APEXA.

- Type your credentials:
 - · Email address
 - Password
- 2 Click on Login.





SELECTION PROCESS

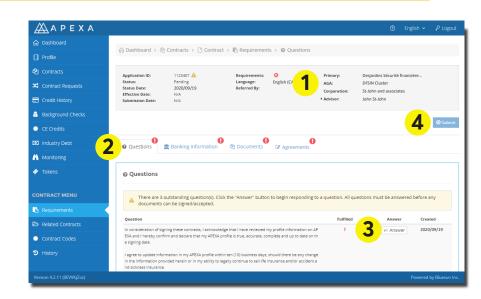
ADVISOR TASK Completing and signing the contract kit



COMPLETING AND SIGNING THE CONTRACT KIT

Answer the questions in all the tabs: Questions - Banking Information -Documents - Agreements.

- 1 Check the contract details:
 - Primary: DFS (the insurer)
 - · AGA: Your DFSIN Cluster
 - Corporation: Your corporation (if applicable)
 - · Advisor: Yourself
- 2 Click on a tab to open it.
- 3 Click on **Answer** next to each question.
- 4 Click on Submit.
 - * The 🕕 next to each tab means there are questions that still need to be answered.
 - * The **Submit** button will be clickable once you complete and/or sign all tabs.



The contract kit has been forwarded to the cluster. Here is how you can see this:

- i It mentions the contract is currently with another party.
- ii The icon is now beside the cluster.

