

Dynacare®

Dynacare Insurance Solutions Scheduler

Fall 2022



Booking your Telephone Interview is Easier than Before!

- Dynacare has created an effortless appointment booking and management system to allow advisors and applicants to schedule their own telephone interview through a secure online portal.
- By receiving the applicant's email address, the advisor or applicant will be able to schedule, change or cancel their own appointments, at their own time!
- To ensure an overall positive experience for the applicant, we encourage you to provide us with the applicant's email and cellphone number when ordering the Tele-Interview.

What are the benefits of the DIS Scheduler

Advisor Benefits

- Automated email notifications when the applicant's appointment has been scheduled or changed
- Speed to access of appointments – advisors can book for the applicant
- One SSO access through the iCARE ordering system – all advisors can have an iCARE profile

Applicant Benefits

- Applicants self-manage their appointment and schedule
- No telephone tag
- Checklist of required documents provided prior to the call
- Email or text message appointment reminders 24 hours and 1 hour before the appointment

FAQs

- **Why was the DIS Scheduler developed?**
 - We want to be able to control our own lives by scheduling our own appointments when convenient. Several companies already offer online scheduling tools – i.e. massage therapy, dental appointments and restaurants. We want to remove callouts, telephone tag, have a better TAT and avoid no-shows.
- **When will the scheduler be launched?**
 - In the Fall of 2022
- **Who can schedule the telephone interview?**
 - Advisors and Applicants through the scheduling tool
- **Will there be a change to the ordering process?**
 - No, there is no change to the ordering process.
- **Will there be a change to the delivery of the interview transcripts and recordings to the carrier?**
 - No, there is no change to the delivery process.
- **What if an advisor does not have an iCare advisor profile to access the scheduler?**
 - All advisors can create their advisor profile at <https://orders.dynacare.ca/customer>

FAQs

- **How does the advisor schedule the appointment on behalf of the applicant?**
 - The advisor will log into the portal and provide certain identifiers (iCare number, policy/application number, DOB, name). If all the identifiers match the order received in iCare, the advisor will be able to schedule the appointment on behalf of the applicant.
- **How is the applicant notified their advisor scheduled an appointment on their behalf?**
 - The applicant will receive an email with a link to click to confirm their appointment.
- **What if the applicant does not confirm the appointment?**
 - Our interviewer will still contact the client during the scheduled timeframe to complete the interview.
- **What if the applicant is a no-show?**
 - Our team will proceed with the standard problem file procedure and contact the applicant to reschedule the appointment or contact the carrier to advise of the delay.
- **What if we do not have the applicant's email address?**
 - A cell phone number could be as effective as we will send the applicant a text message with a link to the scheduling tool.

Advisors can access the DIS Scheduler from iCARE with one click

The screenshot displays the iCARE interface for the 'ORDERS' section. At the top left is the 'iCARE' logo, and at the top right is the word 'ORDERS'. Below the header, there is a navigation bar with the text 'Create new orders and view existing orders' on the left and 'Home / Orders' on the right. The main content area is divided into three cards. The first card is titled 'CREATE NEW ORDER' and contains the text 'Place new order'. The second card is titled 'LIST AND VIEW ORDERS' and contains the text 'Display the orders in a customizable list using various status filters'. The third card, located at the bottom left, is titled 'DYNACARE INSURANCE SOLUTIONS SCHEDULER' and contains the text 'Work in progress. Our Dynacare Insurance Solutions Scheduler will be launching soon, please revisit us in a few weeks'. This third card is highlighted with a blue border.

iCARE ORDERS


Create new orders and view existing orders Home / Orders

CREATE NEW ORDER
Place new order

LIST AND VIEW ORDERS
Display the orders in a customizable list using various status filters

DYNACARE INSURANCE SOLUTIONS SCHEDULER
Work in progress. Our Dynacare Insurance Solutions Scheduler will be launching soon, please revisit us in a few weeks

Applicants can access the DIS Scheduler by clicking the link in the email



Dynacare[®] Insurance solutions

You have recently applied for insurance

You are receiving this email because you recently applied for an insurance product that requires the collection of personal information. Dynacare has been contracted by the insurance company to facilitate the collection of this information and is required to schedule a telephone interview appointment with you.

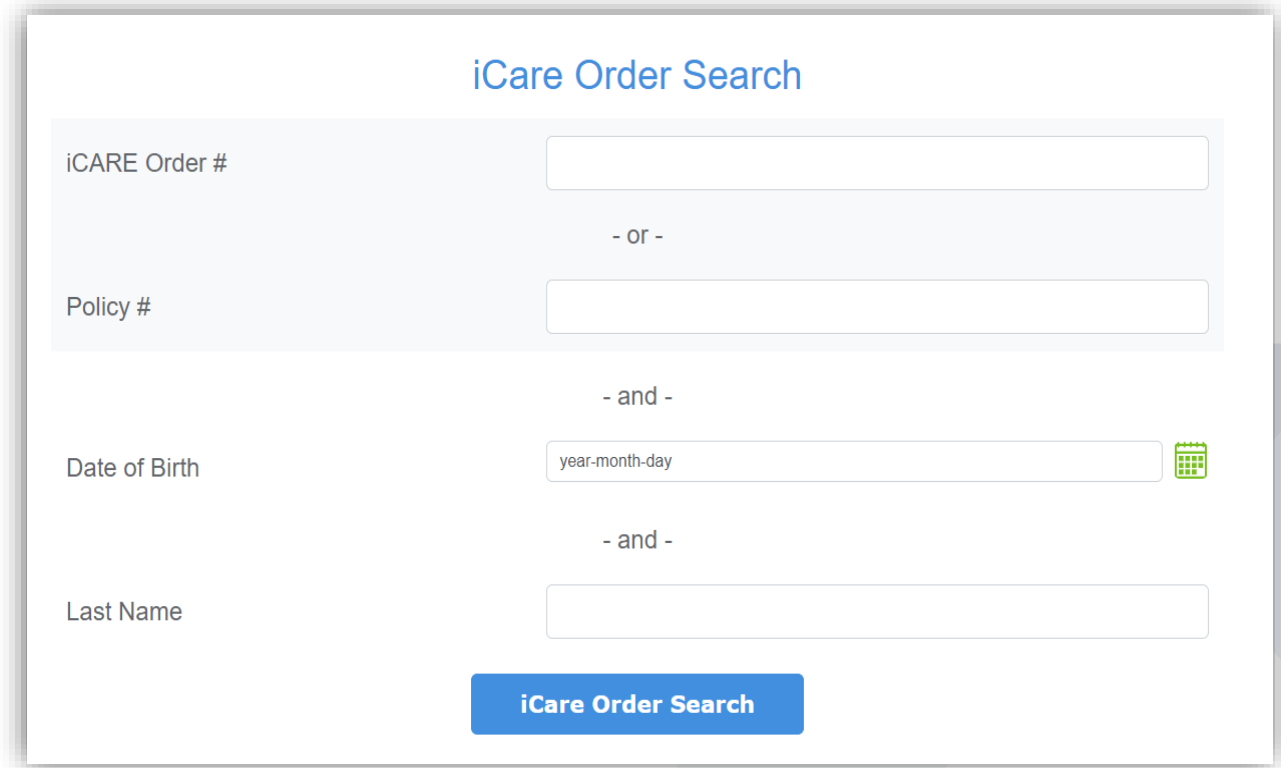
**We have received your order.
Book your Telephone Interview today!**

Dynacare Insurance Solutions Scheduler allows you to effortlessly book and manage your appointments.

Book Your Appointment

Once logged into iCARE, Advisor can search for the Tele-Interview Order in the iCARE system

- Advisors will be able to search for a Tele-Interview order by providing the following information:
 - iCare Order # **OR** Policy #
 - Applicants DOB **AND** Applicants Last Name



The screenshot shows a web form titled "iCare Order Search". It contains four input fields: "iCARE Order #" (text), "Policy #" (text), "Date of Birth" (calendar icon), and "Last Name" (text). The fields are arranged vertically with "OR" and "AND" operators between them. A blue "iCare Order Search" button is at the bottom.


iCare Order Search

iCARE Order #

- or -

Policy #

- and -


Date of Birth 

- and -

Last Name

iCare Order Search

Scheduling the appointment

Dynacare[®] Insurance solutions français My Account 

Schedule Appointment

Applicant Email Address: Secondary Email Address:

Confirm Email Address: Secondary Cell Phone:

Add SMS Notifications

Applicant Cell Phone:

Applicant Timezone:

Applicant Language:

Requires Interpreter?


iCare Order Search **Search Appointments**

The advisor or Applicant will be able to select the appointment date and time by clicking on the Calendar.

Schedule Appointment

iCARE Order: 6515996 Service Type: Tele-interview
Policy: 88888 Language: English
Appt Duration: 30 min Timezone: Canada/Eastern

Appointment Duration:

Preferred Day: 

[Refine Search](#)

	Sun 9/25	Mon 9/26	Tue 9/27	Wed 9/28	Thu 9/29	Fri 9/30	Sat 10/01
6:00 AM	Select	Select	Select	Select	Select		Select
6:30 AM	Select	Select	Select	Select	Select		Select
7:00 AM	Select	Select	Select	Select	Select		Select

Once the appointment is scheduled, there will be a confirmation page with the appointment details.

Schedule Appointment

Appointment Scheduled!

Notifications will be sent according to the preference selected, and start in the next 20 minutes.

iCARE Order:	6515996
Policy:	88888
Service Type:	Tele-interview
Language:	English
Timezone:	Canada/Eastern
Date:	29-September-2022
Time:	9:00

[Close](#)

Both the applicant and advisor can receive email notifications

- **Applicant's** will receive email notifications when:
 - Dynacare has received the order
 - When the appointment has been confirmed
 - If the appointment has been changed or cancelled
 - Appointment reminder 24 hours before the scheduled appointment
 - Appointment reminder 1 hour before the scheduled appointment
- **Advisors** will receive email notifications when:
 - Dynacare has received the order
 - When the appointment has been confirmed
 - If the appointment has been changed or cancelled

How can you ensure maximum success?

- Include the applicant's email address and cell phone number in the appropriate fields when placing an order for a Tele-Interview
- Once Dynacare has received the order for the Tele-Interview, the advisor can log in to schedule the appointment on behalf of their client to avoid any delays and a quick turn around time.