



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 and/or cell phone number, 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 of access to 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 was the scheduler launched?**

The scheduler was launched January 9th, 2023.

- **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>.

- **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 that 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.

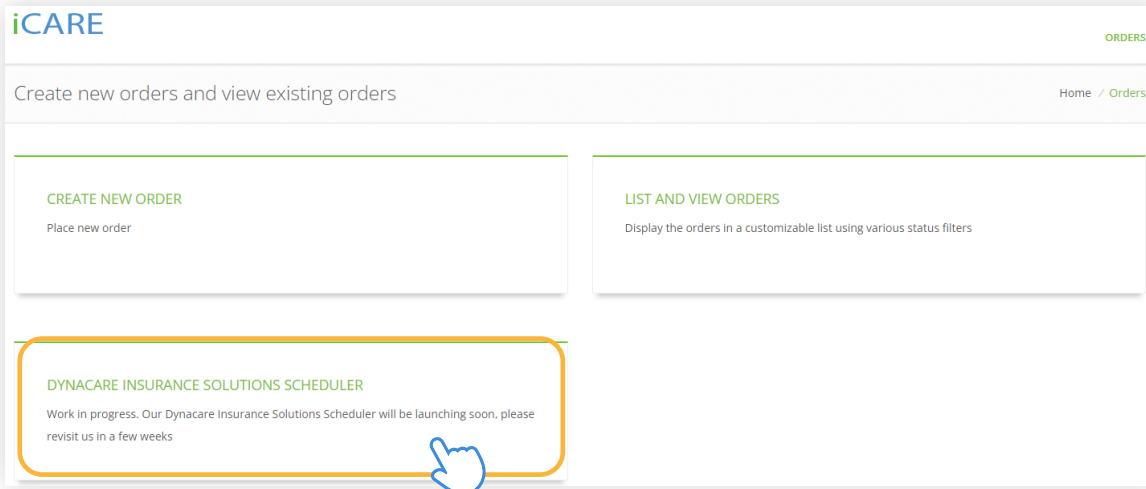
- **What if the applicant is a no-show?**

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. 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



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



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

The screenshot shows a web form titled "iCare Order Search". It contains several input fields: "iCARE Order #" and "Policy #" are grouped together with a "- or -" separator; "Date of Birth" has a "year-month-day" placeholder and a calendar icon; "Last Name" is a separate field. There are "- and -" separators between the "Policy #" and "Date of Birth" fields, and between the "Date of Birth" and "Last Name" fields. A blue button labeled "iCare Order Search" is at the bottom.

- Advisors will be able to search for the most up to date status of an order by providing the following information:
 - iCARE Order # **or** Policy #
 - Applicant's DOB **and** Applicant's last name

Scheduling the appointment

The screenshot shows a web form titled "Schedule Appointment" under the "Dyncare Insurance solutions" logo. The form includes fields for "Applicant Email Address" (with "Applicant@Email.com" as a placeholder), "Secondary Email Address" (with "Advisor@Email.com" as a placeholder), "Confirm Email Address" (with "Applicant@Email.com" as a placeholder), and "Secondary Cell Phone". There is a checked checkbox for "Add SMS Notifications" and a field for "Applicant Cell Phone" (with "(613) 222-3397" as a placeholder). Two dropdown menus are present: "Applicant Timezone" (set to "Eastern") and "Applicant Language" (set to "English"). A checkbox for "Requires Interpreter?" is unchecked. At the bottom, there are two blue buttons: "iCare Order Search" and "Search Appointments". In the top right corner, there are links for "français" and "My Account" with a user icon.

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](#)

Sample notifications the **Applicant** will receive

Dynacare Insurance solutions

Your Telephone Interview Appointment has been booked

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.

Please confirm your appointment below

Applicant Name: J**n D**
Date: Aug 22, 2022
Time (EST): 9a.m.

Confirm Appointment

While we try our best to call you at your booked time slot, some delays might be unforeseen. Rest assured you will be called within the hour.

Dynacare Insurance solutions

You have an upcoming Appointment!

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.

This is a reminder that you have an upcoming appointment in 24 hours

Applicant Name: J**n D**
Date: Aug 22, 2022
Time (EST): 9a.m.

Confirm Appointment

While we try our best to call you at your booked time slot, some delays might be unforeseen. Rest assured you will be called within the hour.

Sample notifications the **Advisor** will receive

Dynacare Insurance solutions

Your Applicant's Telephone Interview Appointment has been booked

Please review the appointment details below

Applicant Name: J**n D**
Date: Aug 22, 2022
Time (EST): 9a.m.

Subscribe to Your Calendar

While we try our best to call the applicant at their booked time slot, some delays might be unforeseen. Rest assured, the applicant will be called within the hour.

Dynacare Insurance solutions

Your Applicant's Appointment has been changed

New appointment details are as follows

Applicant Name: J**n D**
Date: Aug 22, 2022
Time (EST): 9a.m.

Subscribe to Your Calendar

While we try our best to call the applicant at their booked time slot, some delays might be unforeseen. Rest assured, the applicant will be called within the hour.

Both the applicant and advisor can receive email notifications

Applicants 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:

- When the appointment has been confirmed
- If the appointment has been changed or cancelled

Scheduling a Tele-Interview via cellular phone

The screenshots illustrate the following steps in the mobile booking process:

- Step 1:** The user is on the **Appointment Booking** page. They have entered their birth date and passed a CAPTCHA. A **Confirm** button is visible.
- Step 2:** The user is shown a summary of their booking: **iCARE Order:** 10451507, **Policy:** 12345678-9, **Appointment Type:** TRANSLATION - THIRD ..., and **Language:** French. A **Book Appointment** button is present.
- Step 3:** A message states: "Please, find included an appointment link to schedule your upcoming telephone-interview."
- Step 4:** A calendar view shows available slots from 3:00 PM to 4:30 PM. A **Dynacare.ca** button is at the bottom.
- Step 5:** The user is notified: **Appointment Scheduled!** A message box says: "Notifications will be sent according to the preferences selected and will start in the next 20 minutes." Buttons for **Confirm Appointment** and **Cancel/Re-schedule** are shown.
- Step 6:** Final confirmation details: **Date:** January 19, 2023, **Time:** 9:30 AM - 10:30 AM. A support contact number is provided: "For support with your booking, contact us at - 1-888-475-3943".

Applicants will be able to reschedule their appointment if needed and watch a preparation video to ensure a positive experience

Special Instructions
We request all appointment changes to be made minimum 24 hours in advance.

[Subscribe to Calendar](#) [Reschedule Appointment](#) [Cancel Appointment](#)

What to Expect

- Your interview will be approximately 25 minutes and may vary depending on the health history being covered
- You will be asked questions about your health, lifestyle, and family medical history
- Your information will be kept private and confidential
- A Dynacare Health Professional may contact you for other services required by the insurance company

Be Prepared

We may need the following information from you for your Interview:

- ✓ The name, address and phone # of your family physician (if you have one)
- ✓ A list of current medications you are taking (including dose and frequency)
- ✓ A government issued ID to verify who you are
- ✓ Height and weight details, yours and that of any other person insured

 **Make the most of your time with the Interviewer!**
Click here to watch the video
Watch this one minute video on 'How to prepare for the Telephone Interview' to ensure a positive experience.
dynacare.ca/applicantvideos



This is an automated email message. Please do not reply directly. If you would prefer to schedule the telephone interview appointment with Dynacare via phone, or do not wish to receive emails related to this appointment, please contact us at 1-888-475-3943.

dynacare.ca
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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 turnaround time