

## Case Sharing Procedure

When collaborating, a user can share a case file with another user who has access to EVO Insurance.

### Sharing a case file with another user

1. Go to **My files** section in EVO Insurance.

Create an illustration   **My files**   What's new

2. Identify the client file you want to share and click the Share this file icon (arrow symbol).

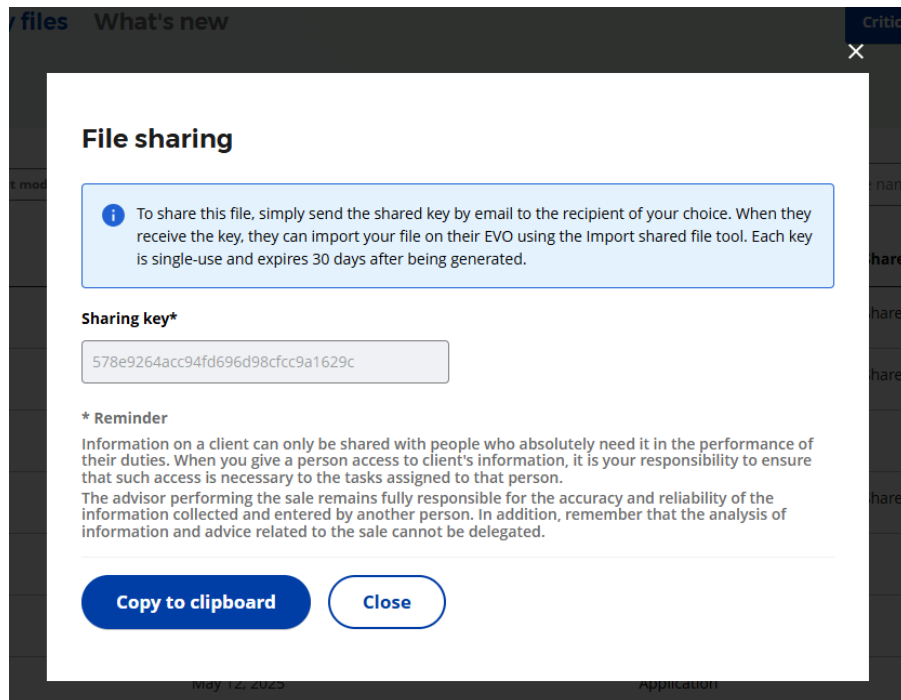
ORGANIZATION DATES

May 12, 2025

Application

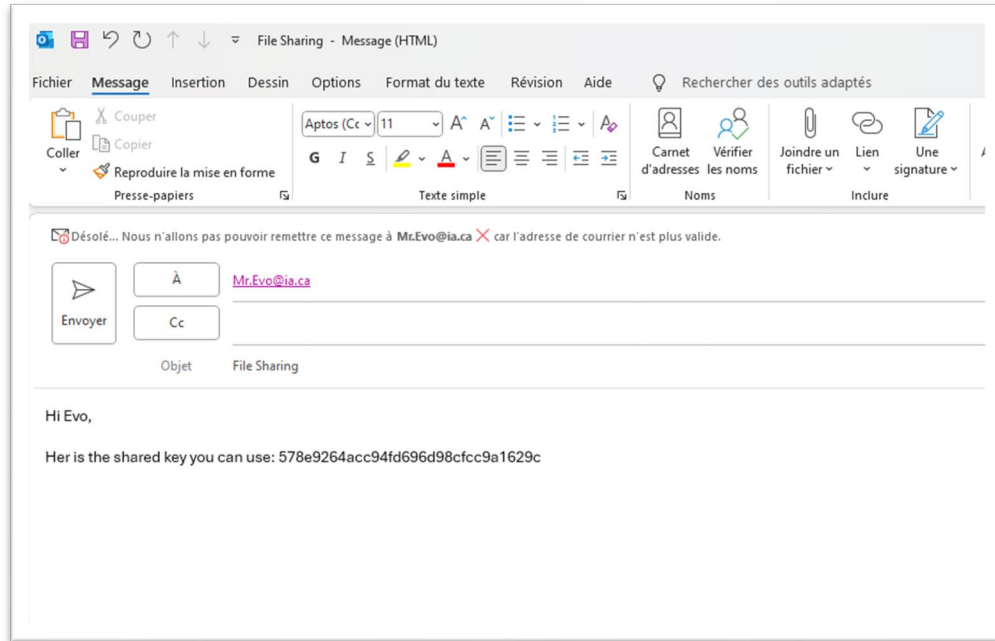


3. In the new window, click the **Copy to clipboard** button to copy the sharing key.



4. Paste the sharing key into an email and send it to the intended recipient (who must have the appropriate access rights to work on the client's file).

**Each sharing key is unique and expires after 30 days.**

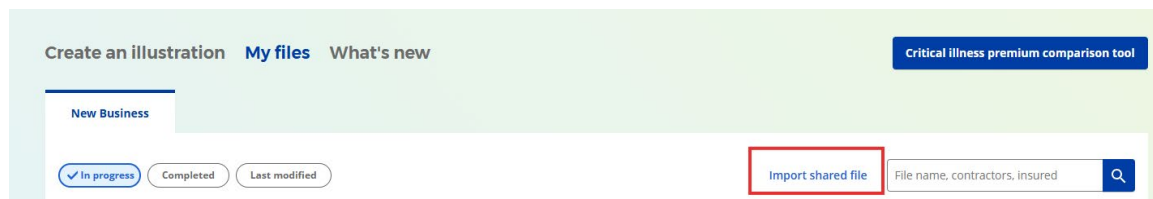


### Receiving a sharing key by email

1. Go to **My files** section in EVO Insurance.

Create an illustration **My files** What's new

2. Click on **Import shares file**.



3. Paste the sharing key received by email into the new window.

**Import shared file**

**i** When you receive a shared key, enter the key in the box and click OK. The received file will open automatically and will be saved in your new business list.

**Enter the shared key**

578E9264ACC94FD696D98CFCC9A1629C

**OK** **Cancel**

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4. After clicking **OK**, the client file will appear on your screen.

**IA** Financial Group **EVO** Life Insurance **FILE SHARED**

← Back to Illustration

**Identification**

☒ Summary  
☒ Advisor(s)  
☐ FILE SHARED  
☒ Consents  
☒ **Identification**  
☐ Insurance history  
☐ Declarations  
☐ Beneficiary(ies)  
☐ Applicant  
☐ Billing  
☐ PAC/PAD Agreement  
☐ Coverage(s)  
☐ Requirements  
☐ Linked Applications  
☐ Validation  
☐ Signature  
☐ Signature Mode  
☐ Signature and Follow-Up  
☐ Transmission

**Last name** **First name(s)** **Middle name (optional)**

SHARED FILE

Please indicate your name at birth, if different than above (optional)

**Gender** **Date of birth**

Male January 02, 1990

**Address**

Address

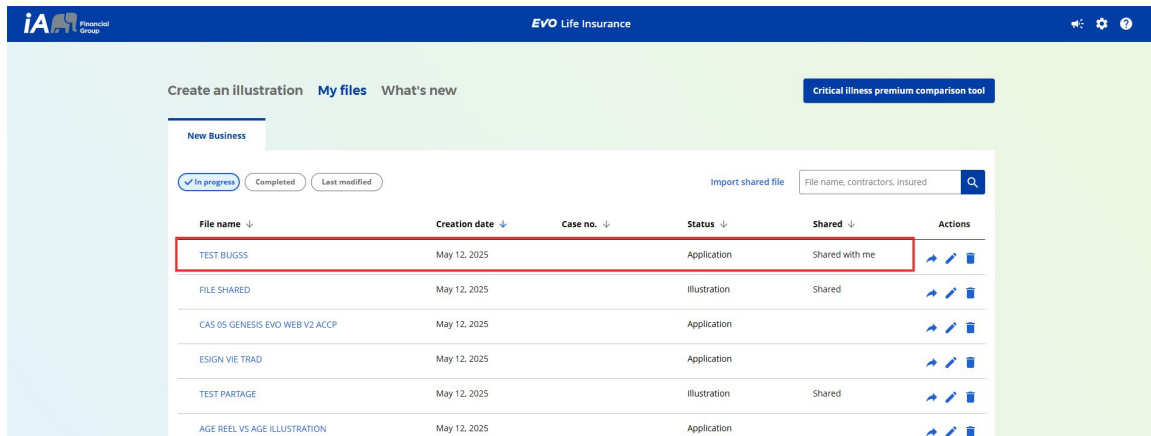
1080-220 Grande Allée E  
Québec QC G1R 2J1  
Canada

**Contact**

**Home phone** **Cell phone** **Work phone** **Extension (optional)**

514 777-7777

You will also find the shared file in your **My files** section:



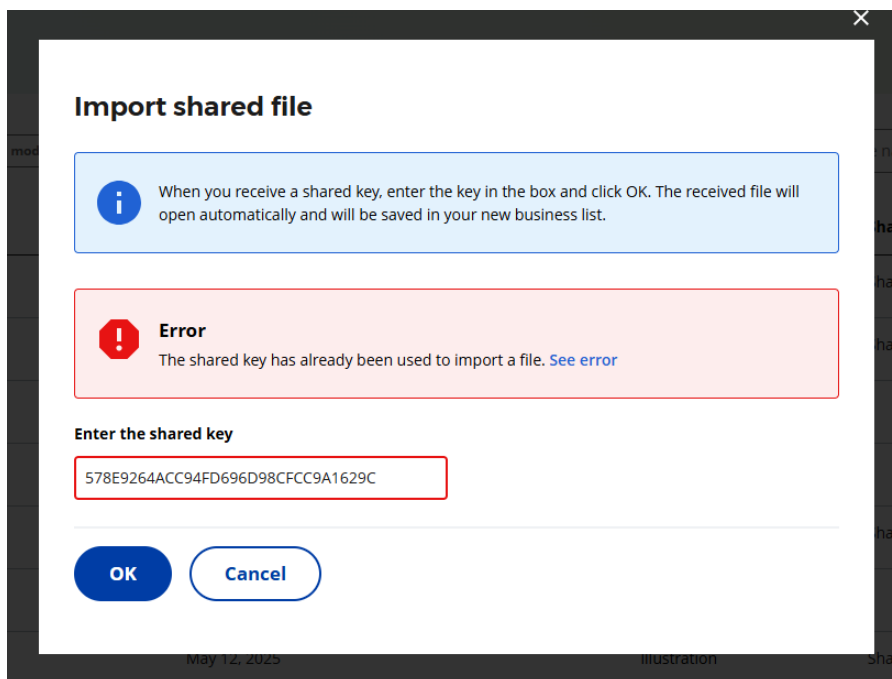
File name	Creation date	Case no.	Status	Shared	Actions
TEST BUGSS	May 12, 2025		Application	Shared with me	<a href="#">Link</a> <a href="#">Edit</a> <a href="#">Delete</a>
FILE SHARED	May 12, 2025		Illustration	Shared	<a href="#">Link</a> <a href="#">Edit</a> <a href="#">Delete</a>
CAS 05 GENESIS EVO WEB V2 ACCP	May 12, 2025		Application		<a href="#">Link</a> <a href="#">Edit</a> <a href="#">Delete</a>
ESIGN VIE TRAD	May 12, 2025		Application		<a href="#">Link</a> <a href="#">Edit</a> <a href="#">Delete</a>
TEST PARTAGE	May 12, 2025		Illustration	Shared	<a href="#">Link</a> <a href="#">Edit</a> <a href="#">Delete</a>
AGE REEL VS AGE ILLUSTRATION	May 12, 2025		Application		<a href="#">Link</a> <a href="#">Edit</a> <a href="#">Delete</a>

If the user needs to transfer the file again to the original sender or another user, they must follow the same case sharing procedure.

### ⚠ Error and warning messages

Here are the messages you may encounter:

#### Key already used to import a file



### Import shared file

When you receive a shared key, enter the key in the box and click OK. The received file will open automatically and will be saved in your new business list.

**Error**  
The shared key has already been used to import a file. [See error](#)

Enter the shared key

OK Cancel

#### Existing file in EVO



“This file already exists in your EVO. Any changes made since the last import will be overwritten. Are you sure you want to continue?”

**Expired key**

“The sharing key has expired.”