

SUMMER 2001 (SHORTER SUMMER EDITION)

## PORTAL DEVELOPMENT STATUS

by Klaas Westera, President

The portal development project team has adopted an iterative approach (for building the portal solution), which includes 4 iterations. The main functionality of each iteration is as follows:

- First iteration: Quick Quote Habitational
- Second: Quick Quote Automobile
- Third: Full Quote Habitational
- Fourth: Full Quote Automobile

To date, the first iteration is well understood and the project plan reflects in great detail the requirements, detailed design, build, testing, and deployment phases. Currently the requirement phase has been completed for QQH and the build will start in two weeks.

The requirements have been gathered, validated and approved through a number of meetings with brokers and insurance company representatives, which have been formalized in Broker Focus Groups and Portal Sub-Committees. The results were presented using various forms, usually used in data modeling techniques, going from use cases to storyboards and finally the prototype. All these forms are documented and a snapshot of the prototype screens are available for viewing on [www.csioinsuranceportal.com](http://www.csioinsuranceportal.com).

The QQA functionality is being developed following the same path. As each of the above functionality are delivered the project will move into integration testing, systems testing and finally into User acceptance testing. It is expected that we'll be ready to start integration testing in September and finalize the project by the end of the year. For more precise dates and information, please contact Dorin Mascan at 416-360-1773 ext. 320 or email at [dmascan@csio.com](mailto:dmascan@csio.com).

The following infrastructure specifications have

already been delivered to our membership: Architecture document, Carrier Interface Specification, XML Request and Response examples. ■

## XML PROJECT STATUS

by Dorin Mascan,  
National Director, Research & Development

The CSIO HAB specification has been delivered in a Draft form at the May 04 meeting with the XML management and technical teams. Since, we have been working on building some XML samples to reflect the mapping to the EDI standards and potentially capture any omissions and errors in creating the original DTD. At the last XML meeting, CSIO has presented an example to the group and is working on providing two or three more.

Meanwhile, CSIO has finished the mapping between the ACORD XML DTD and the CSIO Personal Auto EDI Standards. The creation of the XML specification will follow the same path as for Habitational. The documentation created will include (as for Hab) an EDI to XML mapping document, a code lists document, a DTD, examples and change logs files. The CSIO Automobile specification will be delivered by the end of June.

As the personal lines XML specification development is approaching completion, the maintenance process will begin. This process is currently under development. Keeping compliant with other standards internationally, like ACORD, is adding some more complexity to the process. In the same time, the links that ACORD has secured with UN and WISE is bringing a new dimension to the idea of having one international standard for insurance.

The XML specification will be distributed to the membership, starting with Habitational, before the end of the month. ■

## STANDARD FORMS UPDATE

by Laurence Delomosne  
National Director, Standards and Technology

CSIO is pleased to announce that we have delivered 6 revised CSIO standard forms in PDF & PCL formats, since the beginning of this year: Auto Loss Notice & Property Loss Notice (English & French), Cancellation/Reinstatement (French) and Payment authorization (French). We have also developed 1 new CSIO standard form in PDF & PCL formats: a commercial lines Certificate of Insurance (English & French).

We have several forms currently under development: Certificate of Property Insurance (Personal Lines) and Commercial General Liability form. These can be viewed in the "Forms in Development" section of our Website. Comments and feedback would be appreciated. The 2001 Habitational Form is still undergoing revisions. The CSIO Insurance Portal will support the 1996 form until a new one is developed.

All forms under development will be sent to pre-vote shortly. Work is also underway to add 2 new forms to CSIO's library of Standard Forms: Solid Fuel Heating Questionnaire and Mobile Home Application.

Please note some positive changes made to the FORMS section on our web site:

- All new and revised forms will now be highlighted appropriately so members can quickly identify changes to our PDF & PCL forms.
- We have created a **Request Changes to Forms** section to allow Members to request or suggest modifications to the CSIO standard forms. These requests will be reviewed twice a year in an effort to continuously improve the delivery of forms standards to our membership.
- We have created a **Forms in Development** section to allow Members to view, suggest modifications and comment on CSIO standard

*Continued on page 2...*

## STANDARDS UPDATE

by Howard Bender  
Manager, EDI Standards

Lately I've heard people saying that a lot of work has been going on in the Personal Lines Standards Workgroups to ensure that the CSIO community is ready for the Critical Coverage Reporting project that is being coordinated by IID (a division of IBC) and the Ontario Ministry of Transportation. One might think that this is a project only for Ontario but one should not forget that the main reason for the initiative is get uninsured vehicles off the roads. The cost savings realized by removing these vehicles from the roads will mean great savings for Ontario drivers and insurers. No doubt if the project is successful in Ontario, other provinces will adopt similar policies. Look out!

On July 13, 2001, there will be a Special Standards Workgroup called to deal with another automobile portion - careless drivers or, in Standards terms, conviction codes. As the various provinces send through their unformatted (text) conviction codes, CSIO will grapple with adding and updating our code lists to ensure a quicker response by all who are using the CSIO Standards.

In the most recent June Workgroup, we heard from international guest speaker, Nigel Wooden, (of ACORD, eEG7) talk about the expanded interest and the work going on with respect to various initiatives sponsored by the UN (through Edifact working groups). He also elaborated on the expanded role that ACORD is taking in the world of global standards. Stay tuned as things are changing rapidly and interests become more and more focused on doing business as a global community. ■

This newsletter is a special shorter edition for the summer

## STANDARD WEB SCREENS DEVELOPMENT UPDATE

by Marielle Tousignant  
Manager, Insurance Distribution Solutions

The CSIO Web Screens will soon be available! In our last issue of Connexions Express (Winter 2001) we announced that the future direction of the CSIO Web screen project would be to provide a more high level design. CSIO will concentrate its efforts on providing the required CSIO standard data elements, in other words, the content, along with the logical grouping and sequence of this information. Other details are really up to the carriers' discretion: position, marketing, characteristics, design, colours, etc. Furthermore, as we progress with the development of the CSIO Insurance Portal, it is important that: *the logical grouping and sequence of the information of Standard Web Screens be harmonized with the Portal functionality (Quick/Full Quote Automobile and Habitational screens). CSIO will ensure that Web screens are being developed following the same path as the Portal screens, to provide consistency in all its products.*

This new factor will have a slight impact on the delivery of the Web screens, however, the harmonization phase will ensure that all screen transaction functionalities are themselves similar and intuitive from a user's standpoint. Recently, CSIO met with IBM to establish guidelines and ensure that its development of Web screens follows the same direction as the Portal project. As each Portal functionality is being developed, the Web screens standards then will move into the harmonization phase. The completion of the Web project is expected by the end of this year.

Completed and approved Web screens, such as Billing Inquiry, Claims Status, First Notice of Loss Auto & Habitational are now available in HTML files on [www.csio.com](http://www.csio.com). We hope to post the French versions on our web site in the very near future.

For further information, please contact Marielle Tousignant at [marielle@csio.com](mailto:marielle@csio.com). ■

## OTHER UPDATES

### CREATED A TERMINOLOGY LIBRARY

Our Terminology library will help reduce inconsistencies and misunderstandings within the industry. This 5000 item library includes Insurance and Technology terms that are used commonly throughout the industry. It also includes an English/French glossary and is available to everyone through [www.csio.com](http://www.csio.com).

### WE ENHANCED CSIO'S WEBSITE

2001 brings a new look to [www.csio.com](http://www.csio.com). Members will find our website to be more user friendly, more interactive and much more informative. [www.csio.com](http://www.csio.com) now includes: the terminology library; industry links; feedback forms for members and non-members; CSIO brochures and press releases; downloadable softcopy forms, implementation guides, samples of web screen standards and CSIO's Annual Report.

As you can see, CSIO has been working diligently on several initiatives producing results for our membership to enable them to enhance the competitiveness of the broker driven industry. ■

### Standard Forms continued from page 1....

forms currently under development. Members can access the PDF (read-only) forms and provide comments and suggestions in a [Feedback form](#). This information will automatically be directed to the CSIO workgroup facilitator.

We have also started a new FORMS MAPPING project which will identify the CSIO Standard data elements being captured electronically in various fields. This will be of tremendous assistance to developers who are integrating CSIO standard forms into their systems. We hope to post the forms with mapping information on our web site in the very near future. We thank the Montreal office for their tremendous contributions to this project. For further information, please contact Laurence Delomosne at [laurence@csio.com](mailto:laurence@csio.com). ■

## CALENDAR OF EVENTS

FARM STANDARDS	PERSONAL LINES	STANDARDS WORKGROUP	CTAG	EDI PARTNERS FORUM	WEB SCREEN STANDARDS
TBA	Special Standards Workgroup July 13, 2001 Topic: Conviction Codes Location: Royal & SunAlliance, 10 Wellington East, Toronto Conference Centre Room 2	October 19, 2001 Location: Royal & SunAlliance, 1001 Maisonneuve Blvd. West Montreal, Quebec Conference Room 12th floor For further information, contact: Howard Bender @ <a href="mailto:hbender@csio.com">hbender@csio.com</a> or 416-360-1773 ext 321	October 26, 2001 tentative date CSIO, Toronto	Thursday, October 18, 2001 9:30am - EPOF 12:30pm - Powerbroker 1:30pm - Applied Systems 2:30pm - Keal Technology Location: Royal & SunAlliance Insurance, Room CC2 at 10 Wellington Street East, Toronto, ON	TBA

Visit our web site [www.csio.com](http://www.csio.com) for more information