

WINTER 2002

## PORTAL UPDATE

by Klaas Westera, President

I am pleased to report that the CSIO Insurance Portal (known as the Production environment) is alive and well. The Portal's computer hardware and software have been installed and has proven to be quite stable. The Comparative Quoting Service (CQS), which is included in Phase 1, is fully functional. CQS includes quick and full comparative quoting for property and automobile. All of these have been tested extensively and all functional problems have been corrected. That's not to say that it's perfect, but it is solid and of good quality. One broker's reaction of "I like it!" after testing it for the first time says it all.

The regional executives from the Insurance Brokers Association of Ontario have volunteered to be our initial pilot brokers. This has given us a wide variety of broker types, sizes, BMS systems and communications links to test with. During the pilot process, we have been logging all feedback, prioritizing issues and making adjustments and corrections as required. The actual updates to the CQS are being promoted to the Portal on a bi-weekly or monthly basis. Three pilots began in September and will expand to 15 by the end of November.

Availability of company rates is a key factor in the rollout timetable. We now have a critical mass of Ontario insurer rates up and running. Property is also being readied for testing. While the Ontario tests occur, rates for other provinces will be added so that the Portal can be rolled out to more and more provinces as time goes on. To some extent, the speed of this timetable will depend upon the extent of required changes that result from the pilot process. But we are pretty confident that nothing serious will come up that slows rollout to any significant degree.

Companies working towards rating availability for the Ontario pilot, include Economical, Lombard, CGU, Scottish and York, Traders, AXA, Dominion of Canada, Chieftain, ING, Pilot, Pembridge and Royal & SunAlliance. Facility rates will also be available on the Portal. *Continued on page 2....*

## THE CSIO HELP DESK

by Laurence Delomosne  
National Director, Standards and Technology

With the roll-out of the CSIO Insurance Portal underway, here are some of important undertakings that CSIO has implemented, to support this new technological solution. A Help Desk has been created as a single point of contact to handle all Broker and Company registrations to the Portal, to assist Brokers with general inquiries and questions, and to respond to application and workflow issues. The Help Desk staff will also facilitate 3<sup>rd</sup> party issues such as connectivity and browser questions, upload & download issues and Portal billing inquiries.

In addition, the CSIO Help Desk will be offering a wide range of on-line services, available on the Help Desk Website at [www.csiohelpdesk.com](http://www.csiohelpdesk.com). This site was designed to assist Brokers with training issues and will provide a number of self-service tools such as access to on-line registration services, a knowledge base (list of documented issues with recommended solutions), interactive service requests, status on pending issues, access to training materials, helpful documents, information and tips, and more. These online services will be available on a 24-hour basis, giving Brokers greater flexibility in gaining the customer & technical support services they require.

One of the key components of the Help Desk Website is the section that focuses on Broker Education & Training. 13 self-contained teaching modules were developed to guide Brokers through the navigation of the various portal functions, such as the Quick Quote and Lombard, CGU, Scottish and York, Traders, AXA, Dominion of Canada, Full Quote modules and the Broker Administration module. These web-based training solutions were designed to provide self-paced and on-demand learning tools to allow Brokers to fully utilize the Portal's Capabilities. These are available in both

*Continued on page 2....*

## PORTAL ROLL OUT

by Bill Wallace, Project Manager

The Broker Pilot was initiated in Ontario in mid September. The Pilot is slowly picking up steam with over fifteen carriers either having their auto rates approved in the production environment (the live Portal) or actively verifying their rates on the staging environment (the portal test system). Rates are currently being provided either directly from the insurer's own corporate systems or via the ISI rating engine. While it was always recognized that the rates provided from the insurer's systems would be accurate, the quality of rates being generated from the ISI engine have also proven to be remarkably accurate.

A number of carriers are also currently testing their Ontario property rates. The target is to have Ontario rates for both property and auto available on the production system, for over a dozen carriers, before the end of 2002. Property and auto rates are also being collected for New Brunswick and Nova Scotia in preparation for the subsequent launch in those provinces.

The initial phase of the Pilot was limited to three brokerages. However as more rates are approved on the production environment more brokerages are being added. It is expected that over fifteen brokerages will be actively piloting the Portal by the end of November. The selection of pilot brokers has primarily focused on the executive of the IBAO. This group has been augmented with additional brokerages that meet specific technical and business criteria. The technical criteria include a solid technical infrastructure with high-speed Internet access. The business criteria focuses on both provincial and market dispersion.

The Pilot is expected to conclude in December. The early response from Portal users has been overwhelmingly favorable. Not only have the quote response times been consistently fast, but the response to the user interface has been very positive too. Positive feedback on the general ease of use has been consistently positive.

*Continued on page 2....*

## XML - CONTINUING DEVELOPMENTS

by Howard Bender, Manager, XML Standards

The combining of all of the common Automobile and Habitational XML code lists into one consolidated code list for inclusion in the CSIO XML Spec. is moving along as planned. Notice of the completion will be sent out to those of you listed on our XML contacts list. By the way if you are not sure if your name is on that list please feel free to e-mail myself at [hbender@csio.com](mailto:hbender@csio.com) and be sure to restate your e-mail address along with your desire to be included on the CSIO XML contacts list.

CSIO is contributing in a major way to the development of a 'North American XML farm standard' due to the comprehensive nature of the material in our existing Farm EDI Standard. Most of you may recall that the CSIO EDI Farm Standard was compiled and released mid-year 2001 after a great effort by our members who participated in the Farm Standards Workgroup. The Canadian business user requirements are being included in the XML document which is expected to be finalized in time for the June 2003 ACORD subcommittee vote.

For those of you interested in some CSIO XML training...stay tuned as the rollout of our XML Seminar has started. A pilot session has been given and over the next several months we will be offering invitations to the CSIO membership for those who have an interest in an introduction and working knowledge course on XML as taken from the CSIO XML Standards perspective. Also offered will be a first hand look at the origins of the CSIO XML Standards, why they were developed and where they are going today. For further information or to indicate your interest, please feel free to send an e-mail to [hbender@csio.com](mailto:hbender@csio.com). ■

### Portal Roll Out

*continued from page 1*

The benefits to the broker are numerous resulting in more efficient work-flows, improved service and better accuracy. One key to this is the high quality of the rates. Before rates are moved to the production environment, they are verified and approved by the carrier. Rate changes will be date sensitive and reflected automatically on the Portal. The Broker will not be required to remember to check for rate changes, download or apply changes to an office-based system. The quality goes up, while the broker maintenance goes down. The overall impact is a win-win for both the brokers and the carriers! ■

## LATEST NEWS FROM QUEBEC

by Marielle Tousignant,  
Manager, Insurance Distribution Solutions

### Translation activities

At CSIO, our main concern is offering products and services in both official languages. Therefore we took advantage of the summer season to concentrate on our translation activities:

- We are pleased to announce that five CSIO standard forms, offered until now only in English, are available in French. These forms are as follows: Farm Insurance Application, Application for Automobile Insurance Alberta, Cancellation/Reinstatement Request Alberta, Liability Card and Commercial Vehicle Supplement.
- CSIO Help Desk Services Website and CSIO Help Desk Services Guide are now available in French. Furthermore, 13 electronic teaching modules regarding various CSIO Portal functions are also available in French.

### CSIO Quebec regional office's contribution to industry's activities

This fall, our office has contributed to the rollout of the CSIO Insurance Portal to the industry by participating in the 2002 Insurance & Financial Products Convention, which took place in Montreal on November 7, 2002. CSIO will also participate in the RCCAQ Annual Convention (Quebec Insurance Brokers Association) to be held in Quebec City on November 21-22, 2002.

### CSIONet Help Desk Announcement

Although the Centre for Study of Insurance Operations (CSIO) doesn't re-assume full control over CSIONet support services from the Insurance Bureau of Canada (IBC) until January 1, 2003, CSIO has a Help Desk in place and will start taking calls as of December 1, 2002. CSIO and IBC have arranged for this transition period to take place in order to facilitate the changeover for CSIONet members. For more information, please contact Hilary Syme at [hsyme@csio.com](mailto:hsyme@csio.com).

**Please note:** Effective January 1<sup>st</sup>, 2003, all CSIONet calls are to be directed to the CSIO Help Desk at 1-800-463-CSIO (2746). ■

### Portal Update

*continued from page 1*

The CSIO Insurance Portal is a new vision of communications within the Canadian broker driven insurance industry. It has been a collaborative project from the beginning where all stakeholders have been involved in the process. This has led to a well-designed and beneficial new tool for the industry. A world first in technology and in industry co-operation. ■

## FORMS UPDATE

by Daphne Horn, Standard Specialist

### Mobile Home and Vacation Travel Trailer Applications overwhelmingly approved!

CSIO is pleased to announce that the Mobile Home and Vacation Travel Trailer Applications have been approved by our membership. The English applications are being converted to PDF format, and should be available on our website by December. The French application forms are currently being translated and should be available on our website by the end of December. Thank you to everyone who participated in the creation of these forms!

### PDF Liability Card

CSIO is pleased to announce the availability of a new electronic version of the standard liability card. This PDF form, originally developed for the CSIO Insurance Portal has been extended to our membership as part of our library of forms. Users will be able to complete the bilingual liability card on screen and have it printed to liability card paper. To download a copy of the PDF file, please visit our Standard Forms section on our website at [www.csio.com](http://www.csio.com).

To use the PDF Liability Card you will require special pre-printed liability cards designed for a laser printer. These contain the pre-printed background found on a standard liability card. They can be ordered through Informco at 416-285-1700 or on line at [www.informco.com/forms/html](http://www.informco.com/forms/html). Please quote form number IFC68015 when ordering. ■

### The CSIO Help Desk

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English and French, and can be viewed at: [www.csiohelpdesk.com/English/portaltutorials.htm](http://www.csiohelpdesk.com/English/portaltutorials.htm)

The CSIO Help Desk is completely functional and staffed, and is currently working with the pilot Brokerages that are testing the portal. All of these activities translate into exceptional service and quality components that will allow Brokers to realize the maximum benefits from the use of the Portal.

Finally, the Help Desk is also focusing its efforts on preparing to take over CSIONet support in January 2003. Our staff has already undergone training and is working closely with the Insurance Information Division of IBC to ensure a smooth transition of these services. For further information on the CSIO Help Desk Services, please contact Ms. Hilary Syme at extension 2325 or Ms. Laurence Delomosne at extension 2318. You can reach the CSIO Help Desk at 416-360-1773 (local calls) or 1-800-463-CSIO (2746). ■