You’ve Got Mail

Frequently Asked Questions

An Overview

1. Why is RSA making this change now?

In an effort to accelerate RSA’s digital journey, we recognize the importance of moving more of our operations online in order to be a more efficient partner to our brokers. This decision is also aligned with RSA’s commitment to going paperless in alignment with our sustainability goals, and in light of the COVID-19 pandemic with increased remote working.

2. What are the benefits of switching to digital mail?

Once correctly set up, the new digital service will provide fast, safe and secure mail delivery that will be accessible from anywhere, at any time, using a mobile phone or device. This service offers online storage of mail documents up to one year within the digital mail folders and you can easily download and share the PDFs with customer when needed.

3. When will my brokerage no longer receive physical mail, only digital mail?

The digital mail service came into effect starting December 7, 2020.

4. What if my customer does not want to receive a digital copy of their policy?

RSA will only be providing a customer with a printed copy of their policy directly where this process is already in place. Where a broker’s customer, who currently receives their policy directly from their broker, wants to continue to receive a paper copy of their policy, the broker must meet their current requested and agreed arrangement to deliver the policy. This will require the broker to print and mail the policy directly to their customer.

5. How can I learn more about this digital mail service and how will I be supported throughout this transition?

Check out the RSA Digital Mailbox resource page for robust support materials and information on how to receive technical support.

6. What will you receive by digital mail?

RSA’s Digital Mail impacts Facility, Personal Lines, Commercial Lines, Specialty and Coast Underwriters.

<u>In your confidential folder:</u>

- Statements

<u>In your general folder:</u>

- Client & Broker copies of policy documents*
- All memos sent by RSA (ie. Billing or Underwriting) not addressed to an individual broker
- Mortgage, lienholder, lessor copies that would have previously been sent direct to broker

*Qualifying broker copies in scope of EZ Docs offering will continue to be delivered via EZ Docs.

*Direct Bill Personal Lines policies will continue to be sent directly to the customer

<u>What hasn't changed:</u>

- EZ Docs content remains unchanged. For more information on documents and policy types eligible for EZ Docs, please review these documents:
    - List of Policy Types
    - Types of Documents
- Bulletins will continue to be sent to the email addresses we have on file

Liability cards will continue to print and be mailed directly to the broker or direct to the customer (personal lines direct bill policies only).

7. How does this digital mail solution compare to eDocs – the platform where documents can be downloaded and automatically shared with customers?

Today, RSA brokers are able to digitally receive broker copies of policy documents using EZDocs or eDocs via EDI download solution. This capability exists for Personal Insurance: Auto & Property and for Commercial Insurance: Property/Casualty, Individually-Rated Auto, EBI and Marine.

RSA has explored the ability to expand this capability to insured’s copies and other documents but has slowed the pace to align with the IBAO Going Paperless Initiative. This initiative will enable a more standardized solution that works for the industry, wherever the regulatory environment allows, and where brokers and clients are receptive to digital channels. This initiative will help us to prioritize the needs of broker and bringing digital solutions that will support the broker and their workflows.

We are committed to deliver documents digitally to brokers and have in our digital agenda to move forward with expanding our eDoc’s & EZDoc’s solution to support other documents digitally. We have heard from brokers through this initiative the preferred approach is eDocs vs sending brokers to a portal. IBAO and CSIO together have identified a number of quick wins to help support the level of standardization to assist Insurers. We are working closely to understand the solution and ensure we align to it as we move forward. Once the industry has decided on a solution and a level of standardization has been agreed upon, insurers will be able to make the necessary investment to help drive the optimal solution for our broker partners.

What’s Changing

8. Does the digital mail solution allow for RSA to track customer preferences regarding the receipt of paper copies?

No, this solution does not track customer-level mail/email preferences.

9. Will customers continue to receive paper policies directly from RSA?

RSA will continue to send policies directly to customers who are currently receiving them.

10. Will cheques now be mailed digitally?

No – cheques will continue to be mailed physically and will not be sent through using a digital mail folder.

11. Will Pink Slips continue to be sent to the brokers’ physical office?

Pink Slips will be scanned into the vault and sent physically through mail delivery with the associated policy. If you would like to change the address that will receive the physical mail delivery of pink slips, please email: RXDigitalmail@xerox.com. If you are changing your address as the brokerage location is moving, please ensure you notify your RSM to update your policy documents with Logistics.

12. How will I receive envelopes from RSA for the payments process?

RSA will send a batch of envelopes during the last physical delivery of the payment return mail. The batch should provide approximately a year’s worth of envelopes. To order additional envelopes, you can send an email to RSA at corporatefacilities@rsagroup.ca.

13. I am currently accessing some documents digitally through EZ docs, email, etc. Will I still be able to access documents this way?

This new digital mail service does not impact you accessing documents digitally through these other platforms.

Getting Started

14. How do I get started with accessing these digital folders?

Check out the RSA Digital Mailbox resource page for the digital vault login information and Digital Mailbox link. To activate your account, click on "New Account" where you will be asked to create an account name and password. You will need to enter your email using the email address originally provided to RSA when registering your brokerage. If this email is unknown to you, please contact Xerox at RXDigitalmail@xerox.com.

15. Can I use a Gmail or Hotmail to access my digital mailbox?

RSA's digital mailbox solution has no specific restrictions against the use of these types of emails. The only requirement is that the email provided during the registration process in the enrolment form matches the email used to create the user account.

16. Do we need a specific program or special software to be able to access and use this new digital mail service?

No, you will not be required to use an additional program or special software to access and use this service. All you need is an online browser (e.g. Google Chrome 25.0 and above, Internet Explorer 9 and above, Safari 11 and above, and Mozilla Firefox) and your assigned login information. There is no application required, no software that needs to be installed, and no licensing requirements. This is a 'no-touch IT solution'.

17. Does the Digital Mailbox integrate with Microsoft edge?

No, RSA's Digital Mailbox does not integrate with Microsoft Edge.

18. How long will I be able to access the digital mail within the folder(s)?

All mail documents will remain accessible in the digital mail folders for 12 months.

19. If we fill out the attached form for multiple branches and contacts, are we ensuring that the mail will be sorted by branch or will it be one communal digital access that different locations will be required to sort through?

It will not be a single access for all locations – each location will have access to their own digital mailbox. If you have provided a single, common email for multiple locations, then the mail items for all locations will be posted to a vault with individual folders per location (by postal code).

20. For multiple brokerage offices, is it possible to have commission statements and broker statements delivered to one centralized mailbox?

It is possible to have a single digital mailbox receive mail items for multiple offices, simply provide the same email as receiving access. Please note: The same mail cannot be sent to more than one digital mailbox.

21. If a "General Inbox" address is used as suggested (info@brokerage.ca), is a different email required for the RESTRICTED mail folder? Is it possible to use the same general email address for both?

Yes, the same email address can be used for both the GENERAL/POLICY and RESTRICTED mail folders. It is up to the broker to decide what is best based on their internal operations.

22. Is the account set up by brokerage or per broker?

Each individual or regional office that receives mail today, will have its own RSA digital mailbox. If you have identified a single email to have access to multiple locations' mailboxes, then the mail will be centralized in a consolidated folder for either the Restricted or General/Policy folder or both, depending on the preferences you provided.

23. How do I centralize the delivery of multiple locations to a single or few digital mailbox folders?

To centralize delivery and access of scanned mail items from multiple locations, simply provide a single, common email for multiple locations, which will ensure mail items for all locations will be posted in a single digital mailbox folder.

Navigating Your Vault

24. How do we access and share information received in the digital folder(s) with customers?

The files being sent as digital mail will be in an easy-to-access PDF format. You will be able to download and share the PDF document with your customers.

25. Can I assign more than one name to access the RESTRICTED and the GENERAL/POLICY mail folders?

At this time, only one email address can be provided to access these folders for each brokerage location. Should multiple people at the brokerage need to access this folder, it is suggested that a ‘group email’ be used where multiple people can receive notification and access the mail folder.

26. My brokerage has both Personal and Commercial lines of business –can the digital mail be sorted to accommodate different lines as different people will need to access this mail?

Mail containing policy documents will begin with either "PER" for personal or "COM" for commercial. Within the digital mailbox the user can sort by field name to quickly group personal and commercial mail items.

27. If the user access needs to be changed, how can this be done?

If the brokerage needs to update the email address with access to the Digital Vault, please submit a ticket to Xerox at can.rsa.it.support@xerox.com stating the following information:

- The brokerage name
- The brokerage number
- The access class, either General, or Confidential
- The email address that previously had access
- The new email address which will receive access

Turnaround times for access adjustments will be 24-48 hours.

Do note: Password resets will not be provided via the email above. The “Brokers - Forgotten Passwords” process will be followed for password resets.

28. How will I be notified when there are new mail items in my digital mailbox folder?

Notification will be sent to you based on your preferences. Once you activate your vault, you will be able to update your notification frequency in the Settings menu. You will be able to adjust the time of day and frequency for the notification within your digital mailbox settings.

29. Will the email notification contain the scanned mail item?

No, the email notification will not contain the scanned mail item. You will log into the digital mailbox to retrieve, view, download the scanned mail items. If that login ID/email address was identified by the broker as requiring access to the secured folder, then they will see the secured folder when they log in. They will need to use their email as their login ID and provide a password. Xerox will email recipients provided by the broker with login instructions.

30. How do I delete mail items from the digital mailbox folder?

The folders within the digital mailbox operate similar to an email inbox. To delete a file, right-click on the specific mail item and click 'delete'.

If you need to recover a document deleted in error, email RXDigitalmail@xerox.com with the original file name and include additional details about your request.

31. How can I sort and organize my vault?

You can create folders in your digital mailbox to help sort mail, including personal and commercial policy documents (moving file names starting with “PER” and “COM” respectively). Simply click on the folder icon in the top right panel of your folder view.

You can sort based on date, file name or file size: Locate the “Sort By” icon in the top-right corner of the Digital Vault screen.

Clicking on the icon will reveal sort criteria options, including the following options:

- Sort By options of Name, Date, and Size
- Sort Order including Ascending and Descending
- Page Size including default options of 50 and 100 files per page, as well as an option to set a custom number of items on a page

Simply click the checkmark next to the item you wish to filter, and the order of the search (ascending vs. descending). The Digital Vault will reload and present the information in the requested sort order.

You can also rename email items to quickly identify the content. Simply right click on the item and choose ‘rename’.

32. Within each file doc, what is the separation between broker and client copy and how easy are they to separate?

Customer and broker policy documents will be delivered as a single PDF file with blank pages separating them.

33. Is it important to maintain the file name when saving?

The original PDF file name for a digital mail item can be used to make investigative or copy requests to RXDigitalmail@xerox.com. Otherwise, there is no reason to retain the original file name.

34. I noticed an upload button, does it work?

Yes, the upload button is enabled but Xerox does not necessarily recommend using your RSA digital mailbox to manage your documents.

35. Can you change the destination of the download?

Your download destination is based on your computer system default. Yes, you can change the download destination but it will most likely apply to all downloads, including documents outside of the digital mailbox.

36. What does technical support look like?

Xerox, a best-in-class vendor with vast digital mail experience in the insurance industry, will provide expert technical support. You will have self-serve access to reset your password, as well as robust support materials on the RSA Digital Mailbox resource page. For technical support, simply email can.rsa.it.support@xerox.com.

37. I am having trouble using the Digital Vault, how do I troubleshoot for help?

We have created a troubleshooting document that walks you through how to resolve various commonly faces issued.

If you cannot find the answer, please email Xerox:

Technical Questions & IT Support: can.rsa.it.support@xerox.com
- Anything related to system access issues

Operations: RXDigitalmail@xerox.com
- Anything related to vault content

For more resources – please visit our resource page at www.rsabroker.ca/digitalmail