

FAST. EFFICIENT. EZ.

HOW TO **REGISTER** FOR EZ-DOCS

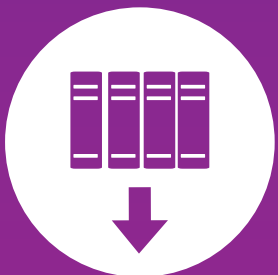
Congratulations on your decision to sign up for EZ-Docs. By going paperless, you will increase efficiency, streamline your workflow and provide better service to your clients.

This simple guide will help you fill in your registration form.



GET STARTED.

To register, fill in the attached EZ-Docs registration form. You can also make amendments to your existing EZ-Docs membership using this form.



1. Personal Insurance, Commercial Insurance or both?

EZ-Docs replaces your traditional paper documents with electronic versions, stored and presented for use within a wide range of broker workflows. Choose whether you would like to use EZ-Docs for your Personal Insurance policies, Commercial Insurance policies or both.

EZ-Docs supports the following policy types:

Personal Insurance: Automobile, Property

Commercial Insurance: Property/Casualty, Individually Rated Auto, EBI, Marine, Garage, Fleet (Quebec only)

For all other policies, you will continue to receive paper copies.

2. EDI or Self Service?

By selecting EDI, your electronic documents will be delivered to you overnight via CSIO EDI download. Documents delivered this way are not stored on our system, so you will need to save them for your records.

If you choose the Self Service option, your documents will be placed on BRAVO for you to view or retrieve in bulk as necessary. They will be stored on BRAVO for at least seven years for your access or retrieval. Self Service may be your preferred option if you only refer to certain documents, do not wish to store your documents on your own system or do not have a broker system that is compatible with our EDI delivery.

Note: Self Service is not available in Quebec for Commercial Insurance and Personal Insurance Automobile and Property.

3. Daily email listing?

You have the option of receiving a daily email listing of documents that have been loaded to EZ-Docs.

You can provide up to three email addresses to receive these updates.

4. EDI users—what's your broker system?

If registering for EZ-Docs via Self Service, you do not need to complete this section.

If you have chosen to receive your documents via EDI, please confirm which broker system is used in your office. EZ-Docs is compatible with PowerBroker, sigXP, The Broker's Workstation, TAM (version 12+) and Epic.

5. Self Service users—who needs access?

If registering for EZ-Docs via EDI, you do not need to complete this section.

If you have chosen to access your documents via Self Service, please list the BRAVO user IDs of any staff who require access to EZ-Docs. Staff who **already have access** to WebBusiness or EZ-Docs do not need to be listed. Staff without an existing BRAVO user ID must first register at rsabroker.ca/register-bravo.

Start using EZ-Docs

You can submit your registration form via mail or email. To send via email, please scan your completed registration form.

Please allow 10 to 15 business days for your registration to be processed. You will receive a notification when your registration is complete.

If you have any questions, please contact your Regional Account Manager.

Mail:

RSA Insurance
Attention: National Logistics
2 Prologis Blvd., Suite 100
Mississauga, ON L5W 0G8

Email: national.logistics@rsagroup.ca