Refined eDocs Codes and Descriptions - Programming Status Scorecard

Updates will be reflected in the scorecard as they are provided by members.		
INSURERS	**Programming Start Date**	**Certification Status**
Aviva Canada	Programming – In Progress	
CAA Insurance Company*	Q4/24	
Chubb Insurance Company of Canada	Q3/24	
Definity	Programmed - Testing in Progress	
Echelon Insurance	Q1/25	
Gore Mutual Insurance Company	Programmed - Testing in Progress	
Insurance Company of PEI	Programmed - Testing in Progress	
Intact Insurance	Programming – In Progress	
Max Insurance*	Programmed	
Northbridge Insurance	Programmed - Testing in Progress	Certified - Billing[+], Cancellation & Lapse[+], Policy Transaction[+], Claims
Optimum General Inc.	Q1/25	
Optiom Inc.*	Q3/24	
Pafco Insurance Company*	Q3/26	
Peace Hills Insurance	Q1/25	
Pembridge Insurance Company*	Q1/25	
Prysm Insurance*	Programming – In Progress	
SGI CANADA	Scoping Effort	
Stratford Underwriting Agency Inc.*	Scoping Effort	
Travelers Canada	Deployed to Production	Certified
Unica Insurance	Programming – In Progress	
L'Unique General Insurance	Programming – In Progress	
Wawanesa Mutual Insurance Company	Deployed to Production	Certified - Claims only
Wynward Insurance Group[+]	Q1/25	

*Personal Lines only
[+]Commercial Lines only

MUTUAL INSURERS	Programming Start Date	Certification Status
Ayr Farmers Mutual Insurance Company	Q4/24	
Bay of Quinte Mutual Insurance Company	Date Not Provided	
Commonwell Mutual Insurance Group	Programming – In Progress	
Cognition	Q4/24	
Estrie-Richelieu Group, Insurance Company	Date Not Provided	
Germania Mutual Insurance	Q4/24	
Heartland Farm Mutual Insurance Company	Q4/24	
Kent & Essex Mutual Insurance Company	Scoping Effort	
The Mutual Fire Insurance Company of British Columbia	Scoping Effort	
Peel Mutual Insurance Company	Scoping Effort	
Portage Mutual Insurance	Scoping Effort	
Promutuel Assurance	Q1/25	
Red River Mutual Insurance Company	Scoping Effort	
Sandbox Mutual Insurance	Scoping Effort	
SEH	Programmed - Testing in Progress	
Tradition Mutual Insurance Company	Q4/24	
Trillium Mutual Insurance Company	Q4/24	

BMS VENDORS	Programming Start Date	Certification Status
Acturis Ltd. - Acturis	Deployed to Production	Certified
Acturis Ltd. - PowerBroker	Deployed to Production	Certified
Applied Systems Inc. - EPIC	Deployed to Production	Certified
Applied Systems Inc. - TAM	Deployed to Production	Certified
Logiciels Deltek Inc. - L'Intermédiaire Select	Deployed to Production	Certified
Rival Insurance Technology - The Broker's Workstation (TBW)	Deployed to Production	Certified
Vertafore Canada - SIGxp	Deployed to Production	

eDocs Programming Scorecard FAQ

Why are updated eDocs codes and descriptions necessary?
CSIO discovered that the labelling of eDocs in broker management systems (BMS) was inconsistent between insurers, and the code did not always reflect the contents of the document. This meant that brokers would need to open the eDocs to determine if they required action and relabel them in their BMS, resulting in additional resources and time. CSIO's eDocs Working Group came together to refine the eDocs codes and descriptions so that they are clearly labelled, saving brokers and insurers both time and money.

What is the eDocs Programming Scorecard?
The eDocs Programming Scorecard displays our insurer and BMS vendor members' estimated implementation dates for programming the updated eDocs codes and descriptions.

How do I read the eDocs Programming Scorecard?
The scorecard lists insurer and BMS vendor members who currently work with eDocs and will be implementing the updated eDocs codes and descriptions. For each member, we list the release date they provided by Quarter/Year. For example, Q1/2024 means the implementation date will be in the first quarter of 2024.

What does "Scoping Effort" mean?
The insurer or BMS vendor has not yet provided us with a specific date but is working to have it on their release schedule. The scorecard will be updated as members provide dates.

What does "Not Provided" mean?
The insurer or BMS vendor has not yet confirmed that the updated eDocs codes and descriptions are in their release schedule.

What does "Programmed – Ready for Testing" mean?
The insurer or BMS vendor has programmed the updated eDocs codes and descriptions, but they are not yet in production. At this stage, the insurer will be testing the codes with the BMS vendor (or the BMS vendor will be testing them with the insurer). Brokers will receive the new codes once both parties have released their changes.

What happens if some insurers program the updated eDocs codes and descriptions, and some insurers don't (continue to use old eDocs codes)?
Once BMS vendors program the new codes, they will be able to support both new and old eDocs codes and descriptions to ensure brokers receive all their eDocs.

What happens if an insurer programs the updated eDocs codes but the BMS vendor does not?
We are working with insurers to ensure proper coordination with each BMS vendor to minimize the impact on the brokers' workflow. There may be a transition period while your BMS vendor programs the updated codes and descriptions.

My mutual insurer partner is not listed on the scorecard.
If your mutual insurer is not listed, please contact them to confirm their eDocs implementation date.

What do I need to do if I'm a broker?
Stay tuned for updates from your BMS partner representative on specific implementation dates and additional support material related to enabling the latest eDocs codes and descriptions. CSIO will also provide monthly updates in our newsletter. If you don't already receive our newsletter, please contact communications@csio.com to sign up.

What steps is CSIO taking to ensure a smooth transition to the updated eDocs codes and descriptions?
CSIO is maintaining close communications with our insurer and BMS vendor partners during the transition period to the updated eDocs codes and descriptions. In order to facilitate this, we are forming a CSIO eDocs Implementation Steering Committee. The Steering Committee's mandate is to ensure successful industry implementation of CSIO's refined eDoc codes by:

- Using lessons learned from prior User Acceptance Testing (UAT) to provide industry direction.
- Providing key input for developing and tracking UAT results.
- Providing industry input and support for the UAT plan.
- Ensuring the group executes a robust UAT plan, leading to a successful implementation.
- Supporting unified Broker and industry communications.
- Executing real system tests.
- Ensuring all BMS and versions are tested.
- Completing end-to-end testing that is mandatory for Carriers and BMS Vendors, including brokers.
- Insurers and vendors to coordinate their CSIO eDocs certification.

Who do I contact if I need more information?
If you have additional questions, please contact your BMS vendor or insurer partners.