



Leverage eDocs Within your Broker Management System

With [CSIO's eDocs](#), documents can be delivered to Broker Management Systems (BMS) directly from an insurer's system via CSIONet. eDocs has been widely adopted by the industry as a document delivery technology, with over 51 million eDocs sent in 2024.

As an alternative to email, you will receive eDocs directly in your BMS, enabling you to:

- Easily identify the eDoc by its code and description without needing to open the document
- Quickly retrieve the eDoc when needed, similar to a digital filing system

Using your BMS to view eDocs creates a streamlined and consistent workflow that reduces administrative tasks and allows more time to assist customers.

Additionally, all major BMS vendors have implemented CSIO's updated eDocs codes and descriptions, ensuring that eDocs are clearly-labelled in your BMS. For example, you will see the following descriptions, "Claim Opening Notice" or "Claim Closing Notice" with the codes, "CON" or "CCN" for the Claims eDoc when a claim is opened or closed.

How to use eDocs in your BMS

By accessing eDocs in your BMS, you can schedule reminders, abeyances, and more without opening each individual eDoc.

Refer to the steps below to see how it works:

Receiving an eDoc

When you receive an eDoc in your BMS, the code and description will appear along with the PDF attachment. Since the code and description are clearly displayed, you will not need to open the attachment to determine the nature of the eDoc.

An eDoc's PDF attachment description will have the following:

- Policy number
- Line of business
- Insurance company code
- Effective date of the activity

Respond Accordingly

Upon viewing the eDoc, you will be able to quickly determine the necessary action based on its code and description.

For example, if you receive a Billing Overdue Payment Notice eDoc, its code, “BOP” and description, “Billing Overdue Payment Notice,” will display in your BMS.

eDoc	Reminder Notice of Past Due Payment
eDoc code	BOP
eDoc description	Billing Overdue Payment Notice

This will help indicate that a customer has a past due invoice, allowing you to send a payment reminder.

Retrieve eDocs in your BMS

An eDoc will already be filed once received in your BMS. When you are finished with the eDoc, you can easily close it and use the code to retrieve it when needed.

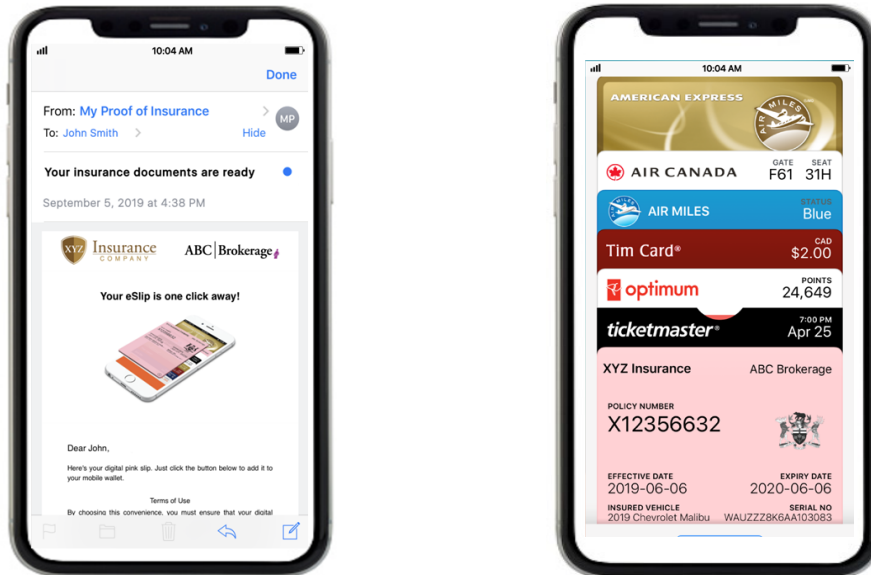
Send digital documents through My Proof of Insurance

You can also send eDocs to customers straight from your BMS using CSIO's My Proof of Insurance (MPOI)





MPOI enables customers to get documents via email and display eSlips on any mobile device.



If you have not yet enabled MPOI, getting started is easy. Take one minute to complete your [Account Request Form](#). Learn more about MPOI and view the FAQ at csio.com.

Speak to your insurer and BMS vendor about eDocs

Contact your insurer partner if they are not currently using CSIO eDocs. If your insurer has implemented eDocs but you are not receiving them, contact your BMS vendor.