

FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY

First InSite

Processing Renewals

Topics Covered in this Manual:

1. Processing Renewals

FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY

First InSite

Processing Renewals



Processing Renewals

1. Login to [First Insite](#) - User Name and Password
2. To view a list of renewals, click on the number of accounts listed beside Accounts Eligible for Renewal, or perform a search by entering the Loan No., Insured Name, or Policy #

The screenshot shows the First InSite web application interface. A yellow circle labeled '1' highlights the 'First InSite' login button. A yellow circle labeled '2' highlights the 'Accounts Eligible for Renewal' link in the Summary Dashboard, which has the number '36' next to it. The interface includes a search bar with fields for Account #, Customer Name, and Policy #, and a navigation menu with options like Summary Dashboard, Accounts, New Quote, Quote Requests, and Account Submission List.

Summary Dashboard

Best Insurance Brokers Inc.	
Total Active Accounts:	5
Total Accounts Currently Past Due:	4
Total Accounts Scheduled to Cancel Within the next 3 days:	0
Cancelled Accounts:	2
Reinstatement Requests:	0
Accounts Eligible for Renewal:	36
Quote Request Queue:	1

[Search Account Funding Details](#)

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Processing Renewals

First InSite Change Password Help Logout [Français](#)
For help call 1-888-232-2238

Account #: Customer Name: Policy #: Search

[Summary Dashboard](#) [Accounts](#) [New Quote](#) [Quote Requests](#) [Account Submission List](#)

Accounts Eligible for Renewal

Account #: ID: Company Name: Broker: Search

1 [2](#) [>](#) [>>](#)

Account #	ID	Renew	Account Booked	Company Name	Account Status	Brokerage	Brokerage Contact	Portfolio
6479	10348	Renew	22-Aug-2013	Dogz R Us	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6424	10265	Renew	16-Aug-2013	Home Building Supplies	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6478	10245	Renew	22-Aug-2013	All Service Truck Stop	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6387	10169	Renew	13-Aug-2013	Luke's Boat Sales	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6360	10168	Renew	12-Aug-2013	Central Taxi Co	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6356	10163	Renew	09-Aug-2013	Ace of Clubs Bar and Grill	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
6324	10131	Renew	08-Aug-2013	Throne Bakery	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
6358	10090	Renew	12-Aug-2013	Pony Tires & Brakes	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6195	9901	Renew	26-Jul-2013	Unique Security Solutions	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
6275	9835	Renew	01-Aug-2013	Tom's Limo Service	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6276	9834	Renew	01-Aug-2013	Electric Bike Delivery SC	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6235	9827	Renew	31-Jul-2013	Advanced Composites	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6134	9810	Renew	22-Jul-2013	Sunset Boat Rentals	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6047	9671	Renew	11-Jul-2013	CompanyName10074	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
6028	9628	Renew	09-Jul-2013	CompanyName10077	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
5919	947	Renew	25-Jun-2013	Sandy's Paint Shop	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
5924	9446	Renew	25-Jun-2013	CompanyName9650	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
5860	9358	Renew	19-Jun-2013	Sandy's Paint Shop	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
5836	9314	Renew	17-Jun-2013	CompanyName9812	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada

3. Locate the contract you wish to renew either by locating the account in the list and clicking **Renew** or by performing a **Search**

Processing Renewals

First InSite [Change Password](#) [Help](#) [Logout](#) [Français](#)
For help call 1-888-232-2238

Account #: _____ Customer Name: _____ Policy #: _____ [Search](#)

[Summary Dashboard](#) [Accounts](#) [New Quote](#) [Quote Requests](#) [Account Submission List](#)

User steps:
1. Enter the required information below.
2. Select "Next" button below.

Detailed Steps [▾](#)

Customer Name: Joe's Sports Shop
Brokerage: Best Insurance Brokers Inc.
Brokerage Contact:
Language Preference:
Total Premiums: 20000.00
Tax on Premiums: 1600.00
Total Policy Fees: 100.00
Tax on Policy Fees: 8.00
Total Invoice Amount: 21708.00
Effective Date: 11/01/2014 (mm/dd/yyyy)
Minimum Earned Premium:* 5000

*Enter the total amount that would be retained by the carrier(s) in the event the policy is cancelled.
Minimum retained policy or broker fee: 100.00**
**Enter the total amount that would be retained by the brokerage in the event the policy is cancelled.
Is this Facility coverage? Yes No

Minimum earned premiums and fees must be disclosed above. Please review the following questions before proceeding to the next step:

10% or more of the total premium is Directors & Officers coverage:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Policies are cancellable at short rate or pro rata	<input checked="" type="radio"/> Yes <input type="radio"/> No
Policies are fully earned on event	<input type="radio"/> Yes <input checked="" type="radio"/> No
Policies are part of a master policy	<input type="radio"/> Yes <input checked="" type="radio"/> No
Policies are earned at an accelerated rate (ie Motorcycle)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Broker of record is your brokerage:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Insured is in bankruptcy:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Customer is a farm in Alberta:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Customer is a fishery in Prince Edward Island:	<input type="radio"/> Yes <input checked="" type="radio"/> No

5 [Back](#) [Next](#)

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4. Enter/confirm the policy premium information
NOTE: be sure to put a value in minimum retained field, even if "0"

5. Review the pre-selected list of questions and click **Next**

Processing Renewals

First InSite Change Password Help Logout Français
For help call 1-888-232-2238

Account #: _____ Customer Name: _____ Policy #: _____ Search

Summary Dashboard Accounts New Quote Quote Requests Account Submission List

User steps:

1. Enter the required information below.
2. Select "Create one pager" button below to generate pay plan for your customer.
3. Include the invoice Payment Options Form with customer invoice.

Customer Name: Joe's Sports Shop
Brokerage: Best Insurance Brokers Inc.

Total Premiums:	\$20,000.00
Tax on Premiums:	\$1,600.00
Total Policy Fees:	\$100.00
Tax on Policy Fees:	\$8.00
Total Invoice Amount:	\$21,708.00
Effective Date:	10-Jul-2014
Minimum Earned Premium: *	\$5,000.00

*Enter the total amount that would be retained by the carrier(s) in the event the policy was cancelled.
Minimum retained policy or broker fee: ** \$100.00
 **Enter the total amount that would be retained by the brokerage in the event the policy was cancelled.
Facility coverage: No

Select Portfolio: FIRST Insurance Funding of Canada
Select Pricing Program: 17 & 10 12 Equal 20 & 9
Coverage: Commercial Personal Lines
Customer Monthly Withdrawal Date: Effective Day
Date of First Monthly Withdrawal: 10-Aug-2014

Rate Calculate or Increase Down Payment **7**

Selected Pricing Program:	17 & 10
Flat Rate:	3.00%
APR:	8.47%
Terms (months):	10
Down Payment(%):	17.00%
Down Payment:	\$5,100.00
Installment Amount:	\$1,725.92
Finance Charge:	\$651.24

Coverage Information **8**

Send Contract document to Brokerage Contact : melissa.dinaro@bestinsurance.cc
Send To: _____

Back **A** **Proceed with Renewal Submission** **B** **Save and Print Renewal Summary** **Close**

* Acceptance of the contract maybe declined if one or more of the above restrictions are not met.

6. Select **Pricing Program**

7. Click **Rate Calculate or Increase Down Payment** for rate calculator

8. Optional Coverage Information fields
Note: optional at this stage. Can be completed upon client acceptance

9. Broker can either:
 (A) **Proceed with Renewal Submission**
 or (B) **Save and Print Renewal Summary**

(A) Proceed with Renewal Submission

11. Confirmation that your Renewal has been submitted for processing



The screenshot displays the First InSite user interface. At the top left is the logo "First InSite". To the right are links for "Change Password", "Help", "Logout", and "Français". Below these is the text "For help call 1-888-232-2238". A search bar contains fields for "Account #:", "Customer Name:", and "Policy #:", followed by a "Search" button. A navigation menu includes "Summary Dashboard", "Accounts", "New Quote", "Quote Requests", and "Account Submission List". The main content area features a confirmation message: "The contract has been submitted for processing. ID # 11677", where "ID # 11677" is circled in yellow. Below the message are two buttons: "Create a New Quote" and "Submit Another Account". The footer contains "Home | Terms & Conditions | Contact Us" and "© 2014 First Insurance Funding of Canada. All rights reserved."

(B) Print and Save Option

Invoice Payment Options

Insured:BCD Logistics
876 Second Ave.
Ottawa, ON, K1K 1K1
Tel: (613) 555-1212

Policy Payments ID	160008565
Account No.	BCDL
Invoice Date	February 9, 2016
Balance Due	\$10,000.00
Currency	CDN

Please return payment or signed form so as not to affect your coverage. Please mail to:

Best Insurance Brokers Inc.
4490 Second Street
Ottawa, ON, K6H 3B7
Tel: (613) 555-1212

A. Payment in Full

Send cheque or money order for \$10,000.00. Make all cheques payable to Best Insurance Brokers Inc.. Payment is due the effective date of the insurance coverage.

B. Credit Card

To complete your payment by credit card go to www.PolicyPayments.com/Best and enter ID: 160008565 and follow directions on screen. An administration fee may apply.

C. Monthly Instalments – PLEASE READ THE ATTACHED AGREEMENT AND SIGN WHERE INDICATED

TOTAL PREMIUMS INCL.TAX	DOWN PAYMENT	11 MONTHLY INSTALLMENTS OF	FINANCE CHARGE	FLAT RATE
\$10,000.00	\$860.30	\$960.25	\$323.00	3.23%

To pay monthly please sign the attached agreement and attach a VOID cheque.

Please ensure any cheque issued for a down payment and/or past due instalment is made payable to Best Insurance Brokers Inc..

Please provide your email and cell phone number. This information is **only** used to communicate with you regarding this payment plan.

Insured Email: _____

Insured cell phone #: _____

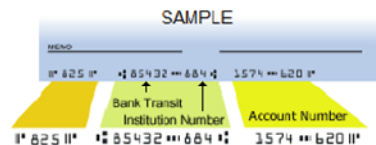
Attach VOID Cheque or complete below banking information :

Bank Account Title (or name): _____

Financial Institution (Bank) Number (3 digits): _____

Branch (Transit) Number (5 digits): _____

Bank Account Number: _____



No client signature is required for renewal

NOTE: this does not mean your renewal is submitted.

Login to firstinsite.ca to submit the renewal

(B) Print and Save Option - Renewal Submission

1. Login to [First Insite](#) - User Name and Password
2. Using the tabs at the top, select **Account Submission List**, locate the contract and click **Submit Account**

The image shows a composite of two screenshots from the First Insite web application. The left screenshot shows the login page with the 'First InSite Enhanced' logo and a 'Login here' link, both highlighted with a yellow circle and a '1' in a blue circle. The right screenshot shows the main dashboard with the 'Account Submission List' tab highlighted with a yellow circle and a '2' in a blue circle. Below the dashboard, there is a table of pending submissions with a 'Submit Account' button highlighted in a yellow circle for the first row.

Account Submission List Table:

ID	Date	Brokerage	Internal ID	Customer Name	Total Account	Status	Action	Delete	Qualicate	Inflence	Type	Portfolio
140000061	19-Sep-2014	Best Insurance Brokers Inc.	JOESS-1	Joe's Sports Shop	\$21,708.00	Pending	Submit Account			True	PQ	FRST Canada
140000060	19-Sep-2014	Best Insurance Brokers Inc.	JOESS-1	Joe's Sports Shop	\$21,708.00	Pending	Submit Account	Delete	Qualicate	False	PQ	FRST Canada
140000049	18-Sep-2014	Best Insurance Brokers Inc.	BENGA1	Advanced Composites	\$20,000.00	Pending	Submit Account	Delete	Qualicate	False	PQ	FRST Canada
140000048	15-Sep-2014	Best Insurance Brokers Inc.	JOESS-1	Joe's Sports Shop	\$21,708.00	Pending	Submit Account	Delete	Qualicate	False	PQ	FRST Canada
140000042	18-Sep-2014	Best Insurance Brokers Inc.	JOESS-1	Joe's Sports Shop	\$21,708.00	Pending	Submit Account	Delete	Qualicate	True	PQ	FRST Canada
140000041	18-Sep-2014	Best Insurance Brokers Inc.	JOESS-1	Joe's Sports Shop	\$21,708.00	Pending	Submit Account	Delete	Qualicate	False	PQ	FRST Canada
140000035	18-Sep-2014	Best Insurance Brokers Inc.	TBD	McDonalds	\$12,000.00	Pending	Submit Account	Delete	Qualicate	False	PQ	FRST Canada
140000033	17-Sep-2014	Best Insurance Brokers Inc.	lba	Shantel's shoe store	\$20,100.00	Pending	Submit Account	Delete	Qualicate	False	PQ	FRST Canada

(B) Print and Save Option - Renewal Submission

Summary Dashboard | Accounts | New Quote | Quote Requests | Account Submission List

On Line Account Submission Process

Customer Name:	Joe's Sports Shop	Total Account:	\$21,708.00
Interest Charge Total Due:	\$651.24	Amount of Deposit:	\$5,100.00
Term (months):	10 Months	Amount of Instalments:	\$1,725.92

Back **4** Step 3

Step 2 : Complete Policy Details

Add Policy / Broker Fee(s)
If applicable, enter amount of Broker Fee or Policy Fee associated with this contract:
(Not included in the premium amounts)

100.00

If applicable, enter amount of Tax on Broker/Policy Fee(s)

8.00

Total Broker/Policy Fee(s) + Tax

108.00

Coverage Information

Policy No	Effective Date	Carrier &/or Wholesaler	Premium	Tax	
12345	01-Nov-2014	Strategic Underwriting Managers Inc. / Aviva Canada, Allianz (Toronto)	\$20,000.00	\$1,600.00	Edit Delete

Cancel Submission

Add Policy Information Below

Add/Update Policy

Policy No: AND/OR

Broker Reference:

Effective Date: 01-Nov-2014

Expiry Date: 01-Nov-2015

Coverage Type: -- Select One --

Premium Cost: 0.00

Taxes: 0.00

Minimum Earned Premium: 0.00 (\$ amounts earned when policy goes into effect)

Wholesaler: -- Select One -- OR

Carrier: -- Select One --

Additional days to cancel: 25

Save Policy Cancel

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3. Confirm/complete policy details if necessary
NOTE: for MGA policies, premium breakdown is required
4. Once all policy information has been entered, click **Step 3**

(B) Print and Save Option - Renewal Submission

First InSite Change Password Help Logout **CRISGAIN**
For help call 1-888-232-2238

Account #: _____ Customer Name: _____ Policy #: _____ Search

Summary Dashboard Accounts New Quote Quote Requests Account Submission List

On Line Account Submission Process

Customer Name:	Joe's Sports Shop	Total Account:	\$21,708.00
Interest Charge Total Due:	\$651.24	Amount of Deposit:	\$5,100.00
Term (months):	10 Months	Amount of Instalments:	\$1,725.92

Back to Step 2

Step 3: Down Payment, Void Cheque and Account Submission

Your Brokerage is to keep the down payment? Yes No
Note: If you are not collecting the down payment the Brokerage is still responsible for line on risk.

Additional amount retained by the brokerage: *
* If applicable, enter the dollar amount that the broker has retained in addition to the downpayment amount.

Void Cheque Information:

Financial Institution:	0004 - TD Canada Trust
12345	0004 1234
Bank Transit	Institution Number Account Number
Commercial	

Account Holder Name: test

Update Customer Banking Information

Account Submission Note:

A note is only necessary if you would like to communicate something specific about this contract to the FIRST Insurance Funding service team.

AGENT OR BROKER REPRESENTATIONS
Selecting "Complete On Line Submission" you warrant and agree to the Agent or Broker Representations as outlined in the contract. You further agree that the brokerage has been furnished with these representations and you have the authority to submit this contract renewal request and agree to the representations.

You further warrant that the Brokerage has collected the down payment, if applicable, and any other sums due as required by the agreement and is holding same or they are added with this agreement.

Complete On Line Submission Cancel Submission

5. Review Client Banking Information and Update (with void cheque) if required

6. No need to print and sign – simply click to agree to the statement

7. Click **Complete On Line Submission**

5

Banking info carries through

Update banking info if necessary

6

7

(B) Print and Save Option - Renewal Submission

8. Confirmation that your Renewal has been submitted for processing

The screenshot displays the First InSite user interface. At the top left is the logo "First InSite". To the right are links for "Change Password", "Help", "Logout", and "Français". Below these is the text "For help call 1-888-232-2238". A search bar contains fields for "Account #:", "Customer Name:", and "Policy #:", followed by a "Search" button. A navigation menu includes "Summary Dashboard", "Accounts", "New Quote", "Quote Requests", and "Account Submission List". The main content area features a confirmation message: "The contract has been submitted for processing. ID # 11677", where "ID # 11677" is circled in yellow. Below the message are two buttons: "Create a New Quote" and "Submit Another Account". The footer contains "Home | Terms & Conditions | Contact Us" and "© 2014 First Insurance Funding of Canada. All rights reserved."

Contact Us

Contact a member of your dedicated service and support team with any questions or you can reach us at:

clientservices@firstinsurancefunding.ca

1 888 232 2238