

TEIG®
ROGO™

WORKFLOW

Integrated Inquiry

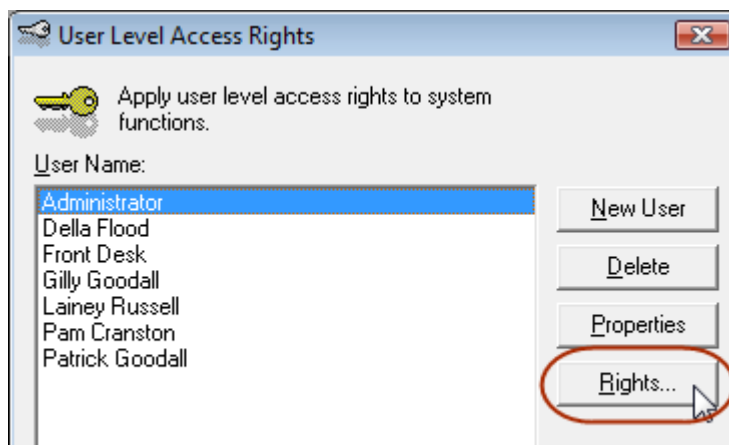
Introduction

TEIG® Rogo™ provides three WebConnect options on the Economical WebConnect toolbar: Policy Inquiry, Claims Inquiry, and Billing Inquiry. Results for each of these will appear in PDF format in the TBW window and can be saved to the relevant client folder. This integrated inquiry solution can be accessed either from the WebConnect button on the TBW toolbar or from an existing Economical, Perth, Western General or Waterloo policy.

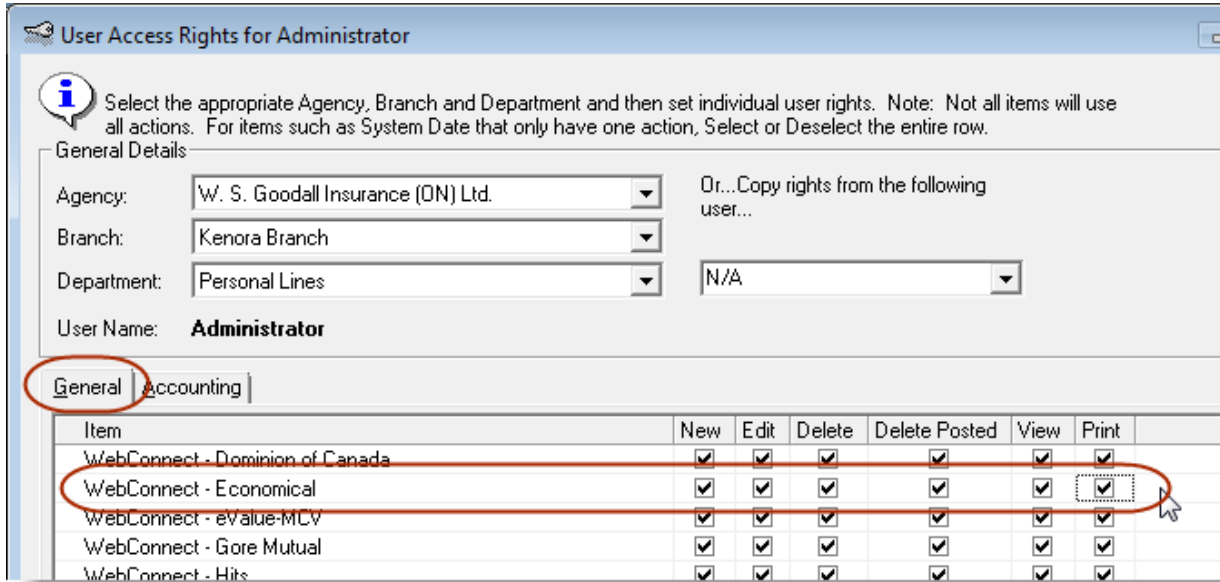
Initial Setup of TEIG Rogo

Prior to using the solution for the first time, the brokerage administrator must complete a one-time set up of the functionality in TBW.

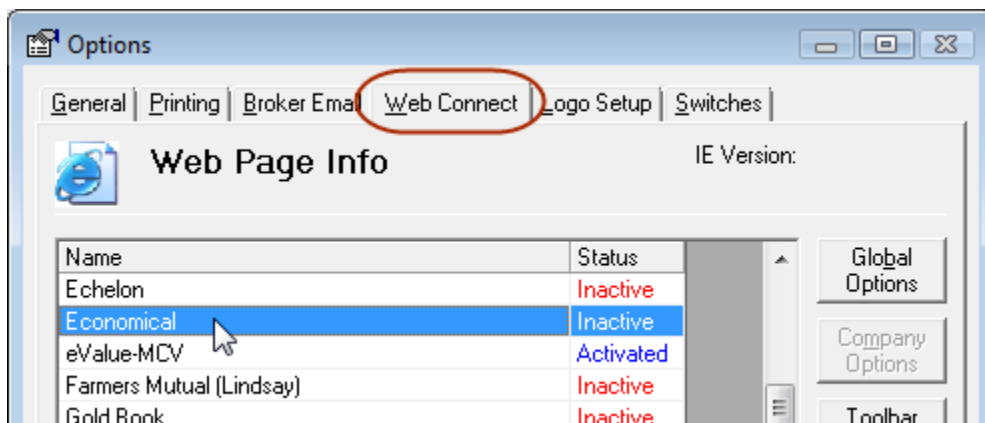
1. Ensure you have a listing of all individual The Broker Extranet® usernames and passwords.
 - TEIG supplies these credentials at the request of the brokerage. A unique username and password is available for every broker staff requested.
 - If you require usernames and passwords, please contact your Broker Solutions Specialist.
2. Open **TBW**, and set **User Rights** for the TBW user who will be using TEIG Rogo as follows:
 - a. Click **Tools, Administrative, User Manager**.
 - b. In the **User Level Access Rights** dialog, click the **User Name** and then click the **Rights** button.



- c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Economical** in the **WebConnect** category.
 - To select all items in the row at once, click in the cell at the very end of the row.

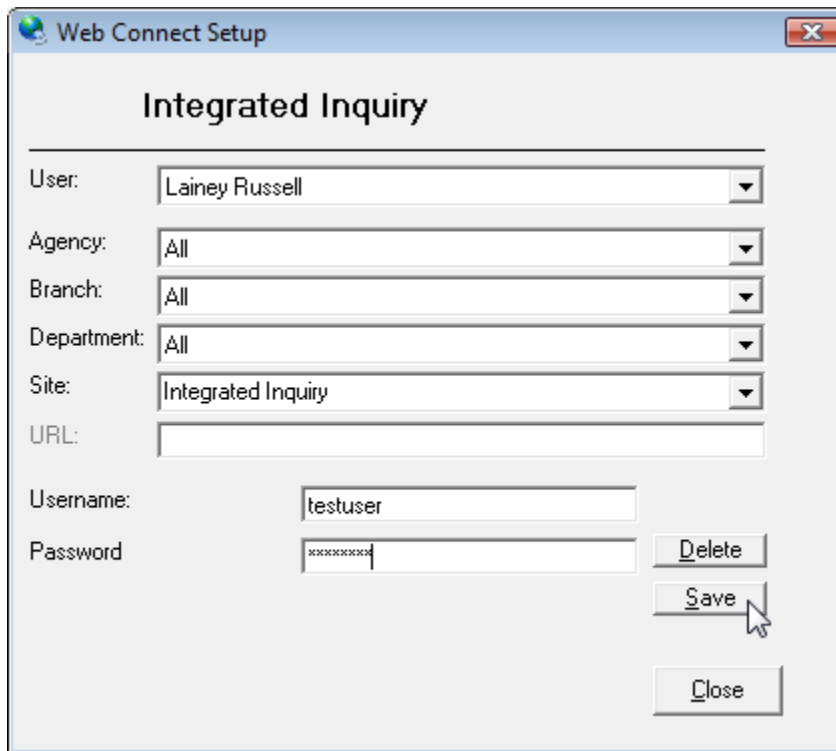


- d. Click **Apply to All** in the **User Access Rights** window to save these user rights, and then click **OK** in the **Attention** window.
 - e. Click **Close**, and then click **OK**.
3. To set up **WebConnect** for TEIG Rogo,
 - a. Under **Tools**, click **Options**.
 - b. On the **WebConnect** tab In the **Options** window, find and double-click **Economical**.



- c. In the **WebConnect Setup** window,
 - i. Select the **User**.
 - ii. Select the applicable **Agency, Branch, and Department**.
 - iii. Under **Site**, select **Integrated Inquiry**.
 - Note that the **URL** box will be empty.
 - iv. Enter the **Username** and **Password**.
 - v. Click **Save**, and then click **Close**.

NOTE: Be sure to update your WebConnect Setup details whenever you reset your Password. Note that TEIG Broker Extranet passwords are non-expiring.




The screenshot shows a window titled "Web Connect Setup" with a sub-header "Integrated Inquiry". The window contains several fields and buttons:

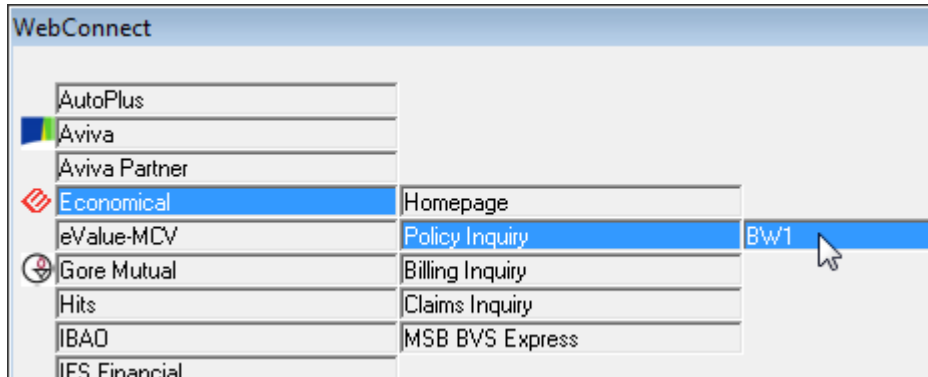
- User:** A dropdown menu with "Lainey Russell" selected.
- Agency:** A dropdown menu with "All" selected.
- Branch:** A dropdown menu with "All" selected.
- Department:** A dropdown menu with "All" selected.
- Site:** A dropdown menu with "Integrated Inquiry" selected.
- URL:** An empty text input field.
- Username:** A text input field containing "testuser".
- Password:** A text input field containing "xxxxxxx".
- Buttons:** "Delete", "Save", and "Close". A mouse cursor is pointing at the "Save" button.

- d. Click **OK**.

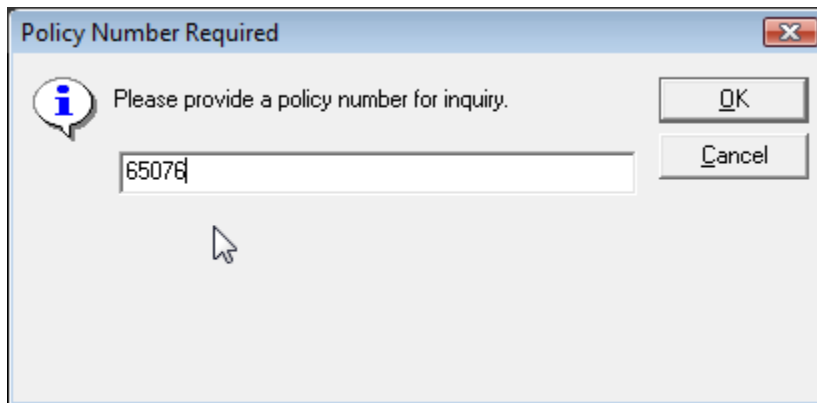
You can access the new TEIG Rogo feature in one of two ways – either from the WebConnect button on the TBW toolbar or from an existing Economical, Perth, Western General or Waterloo policy.

Accessing Economical WebConnect from the TBW Toolbar

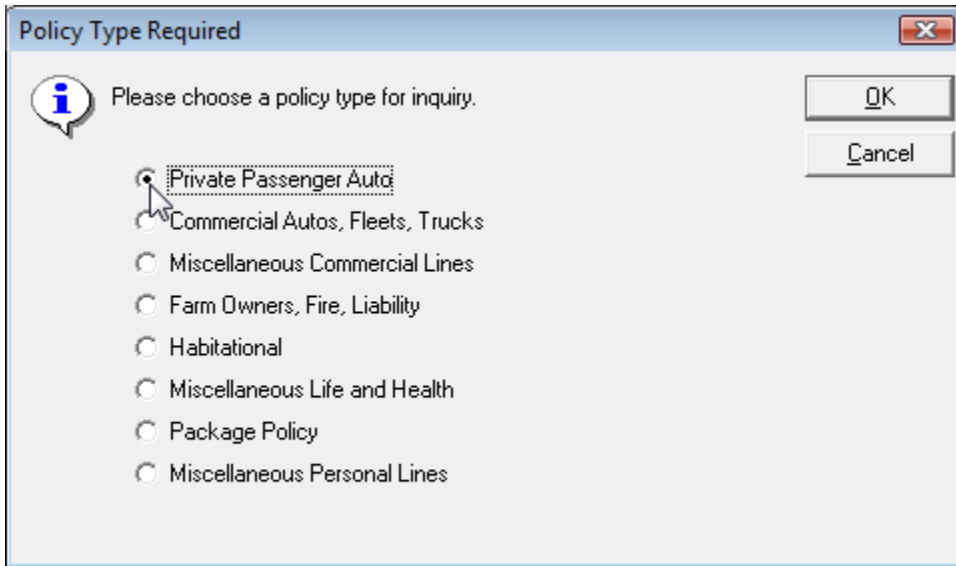
1. Click the **WebConnect**  button on the **TBW toolbar**.
2. In the **WebConnect** window, click **Economical**, and then select **Policy Inquiry**, **Billing Inquiry**, or **Claims Inquiry** and your **User Login**.



3. In the **Policy Number Required** window, enter the policy number for the inquiry, and then click **OK**.



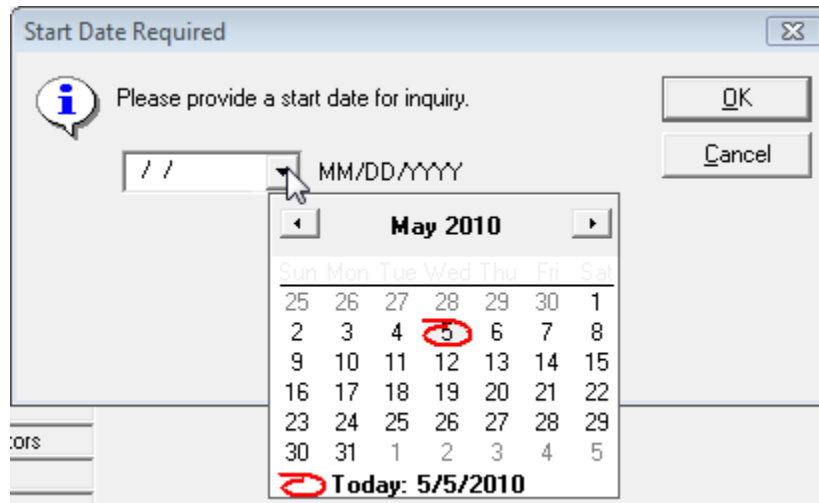
4. Select the **Policy Type** for the inquiry and click **OK**.



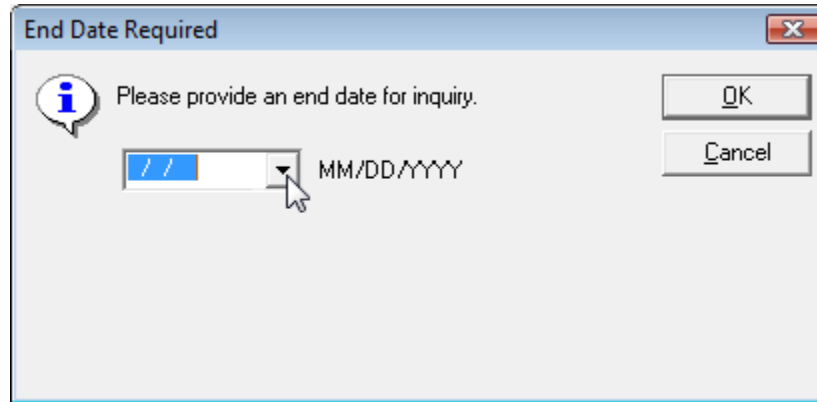
For Claims Inquiry Only:

- a. Select or enter a **Start Date** for the inquiry.

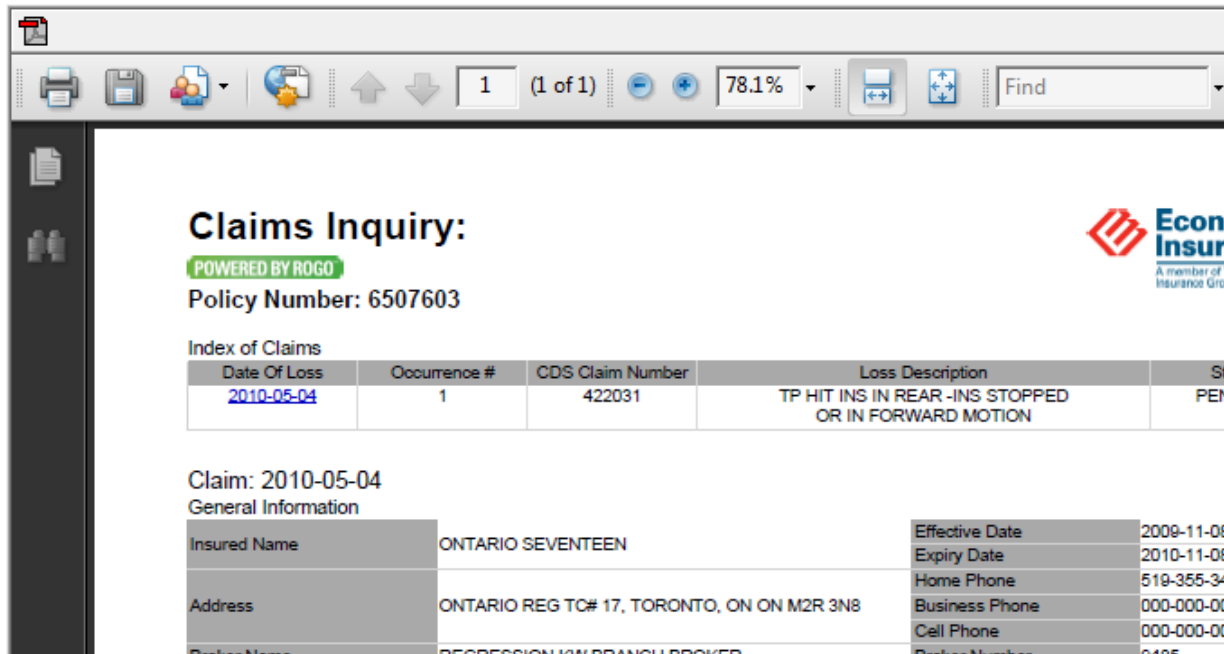
Note: The Claims Inquiry solution is designed to return up to the first five claims within the date range you provide. If there are additional claims within the date range, a note is displayed in the PDF to alert the user. To display these additional claims, a new inquiry request must be completed with a revised date range.



- b. Select or enter an **End Date** for the inquiry.



5. The Inquiry results will open in the **Document window** in PDF format.



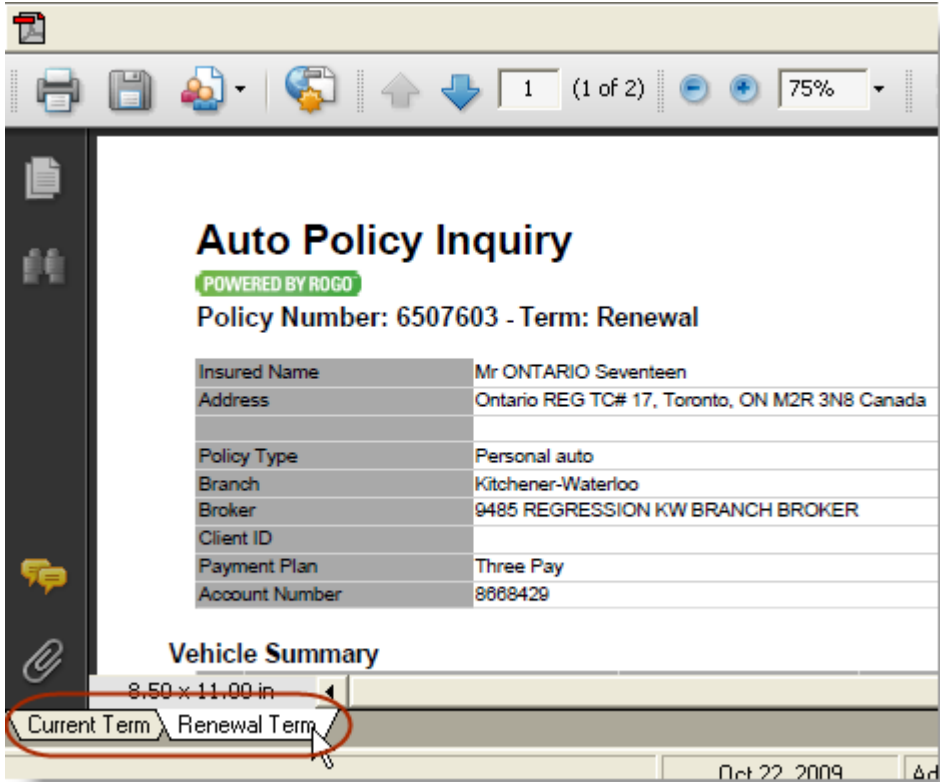
The image shows a PDF document window with a toolbar at the top. The toolbar includes icons for print, save, and other document functions, along with a page indicator showing "1 (of 1)", a zoom level of "78.1%", and a search field labeled "Find". The main content of the document is a "Claims Inquiry" report. At the top right of the report is the "Econ Insurance" logo, which includes the text "A member of Insurance Group". Below the logo, the text "POWERED BY ROGO" is displayed in a green box. The "Policy Number: 6507603" is shown below that. The "Index of Claims" section contains a table with the following data:

Date Of Loss	Occurrence #	CDS Claim Number	Loss Description	St
2010-05-04	1	422031	TP HIT INS IN REAR -INS STOPPED OR IN FORWARD MOTION	PER

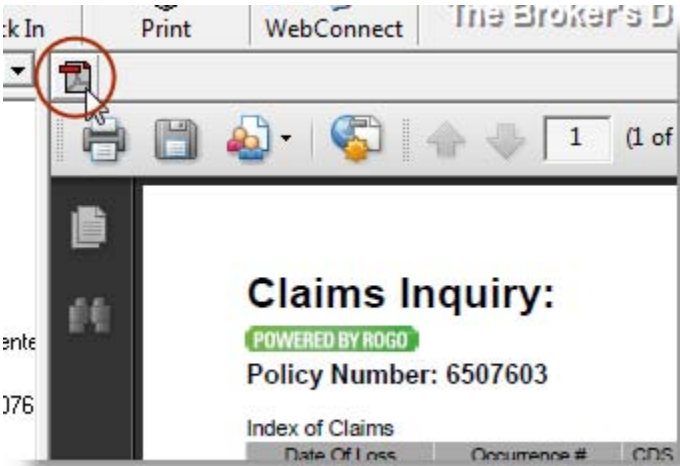
Below the table, the "Claim: 2010-05-04" section is titled "General Information" and contains a table of details:

Insured Name	ONTARIO SEVENTEEN	Effective Date	2009-11-08
		Expiry Date	2010-11-08
		Home Phone	519-355-34
Address	ONTARIO REG TC# 17, TORONTO, ON ON M2R 3N8	Business Phone	000-000-00
		Cell Phone	000-000-00
Policy Name	REGRESSIONAL BRANCH BROKER	Policy Number	0405

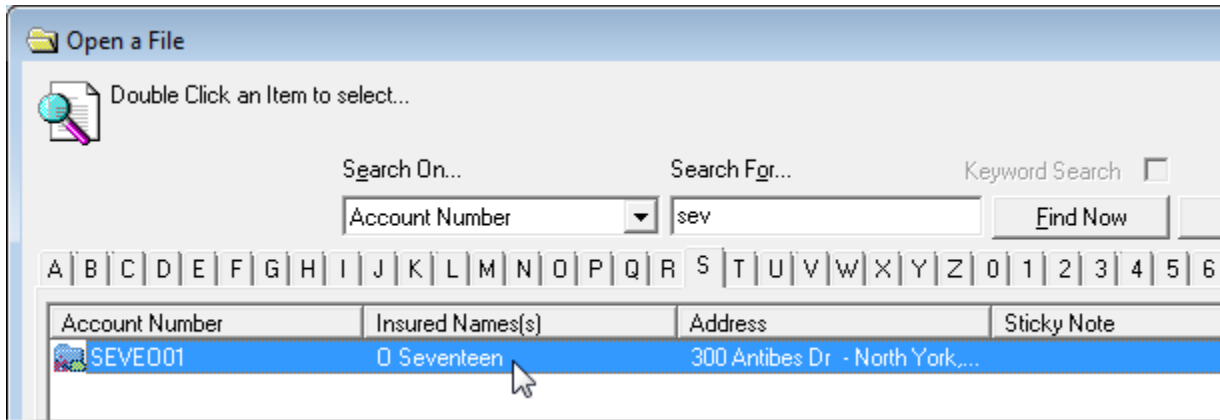
Note: For Policy Inquiry only: If a Renewal Term version of the policy has already been released by TEIG, both **Current Term** and **Renewal Term** inquiry results will be available in PDF format. Click the relevant tab to view details.



- 6. To save the document to a client folder,
 - a. Click the **PDF** button in the top left corner of the Document Window.

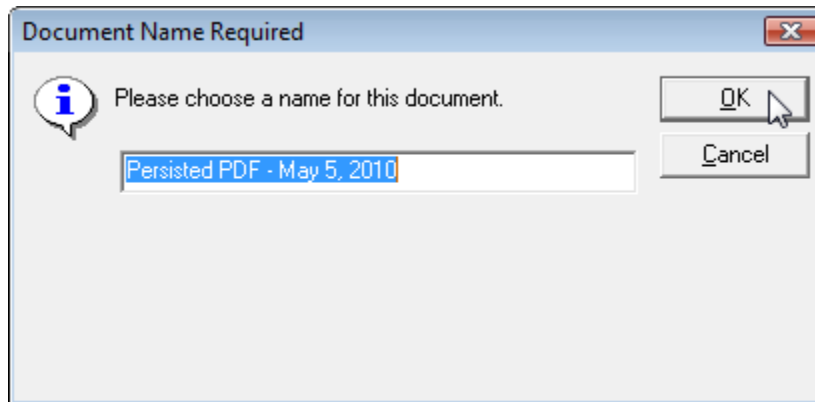


- b. In the **Open a File** window, select a **Search On** category, enter **Search For** criteria, and then click the **Find Now** button to find the client folder. Select the client folder and click **OK**.



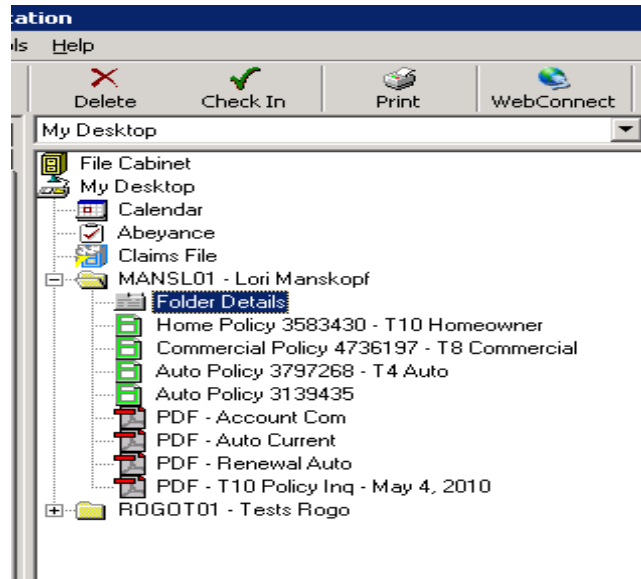
- c. Enter a name for the document, and click **OK**.

Note: For a Policy Inquiry Only - For those policies with both Current and Renewal Term PDFs, each document must be saved separately to the client folder.



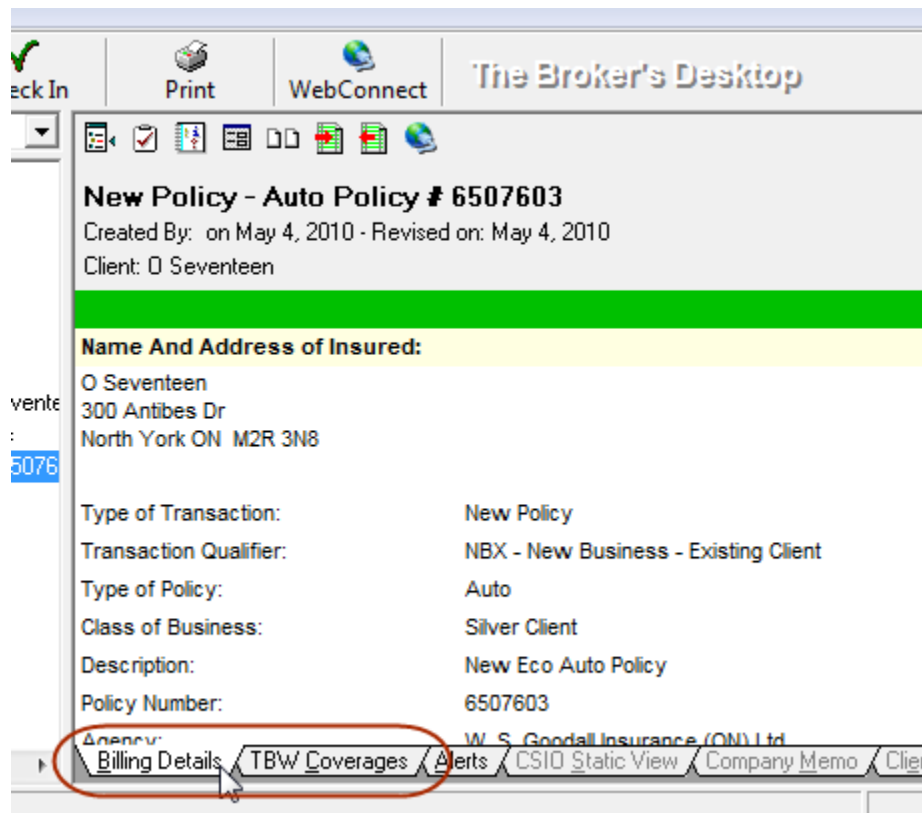
The saved document will open in the **Document Window** and appear in the **Desktop Tree**.

For those inquires done from the WebConnect on the TBW Toolbar, the saved PDF documents will appear all together at the bottom of the Desktop Tree (as shown below).

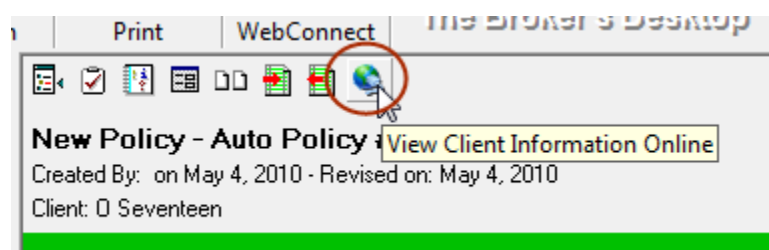


Accessing Economical WebConnect from an Existing Economical Policy

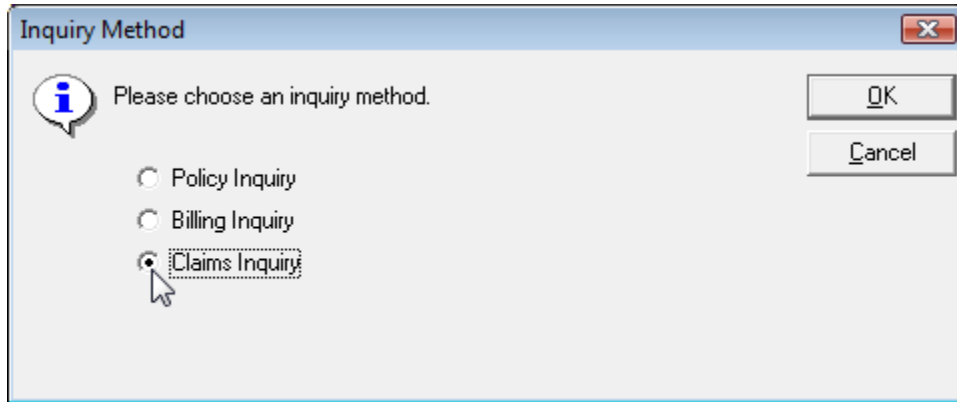
1. Open the policy document, and click either the **Billing Details** tab or the **TBW Coverages** tab.



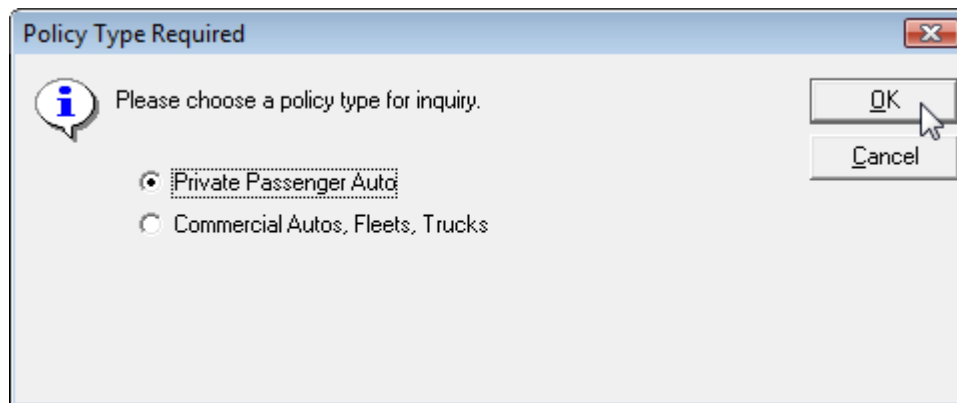
2. Click the **View Client Information Online** button on the **Policy** toolbar.



3. In the **Inquiry Method** window, select the inquiry method, and then click **OK**.



4. Select the **Policy Type** for the inquiry and click **OK**.

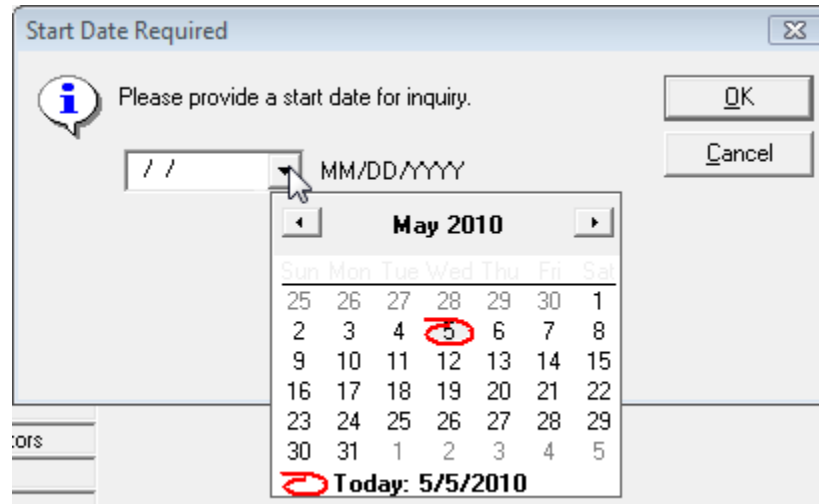


Note: This screen will only appear for auto policies. It is required in order to determine whether the policy is commercial or personal auto.

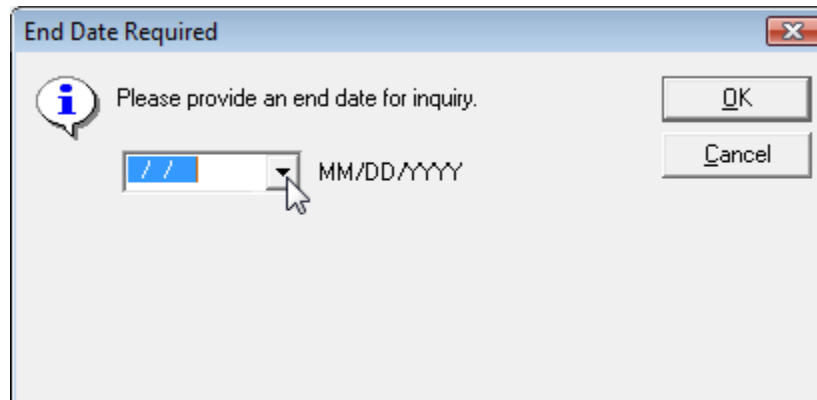
For Claims Inquiry Only:

- a. Select or enter a **Start Date** for the inquiry.

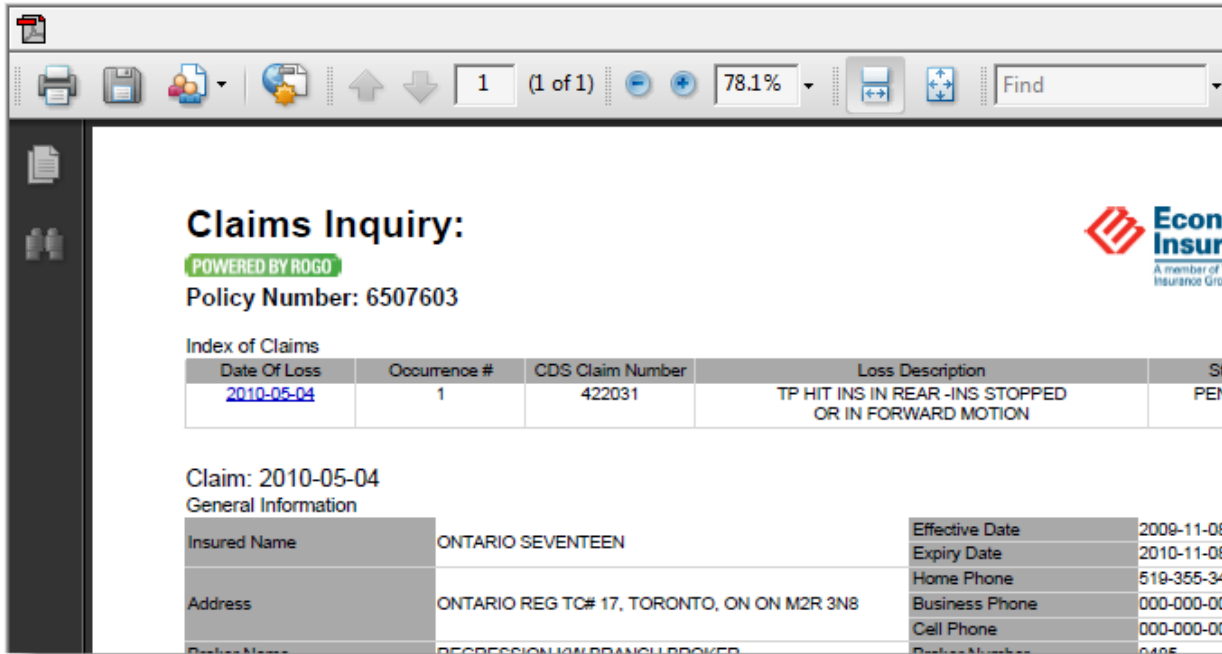
Note: The Claims Inquiry solution is designed to return up to the first five claims within the date range you provide. If there are additional claims within the date range, a note is displayed in the PDF to alert the user. To display these additional claims, a new inquiry request must be completed with a revised date range



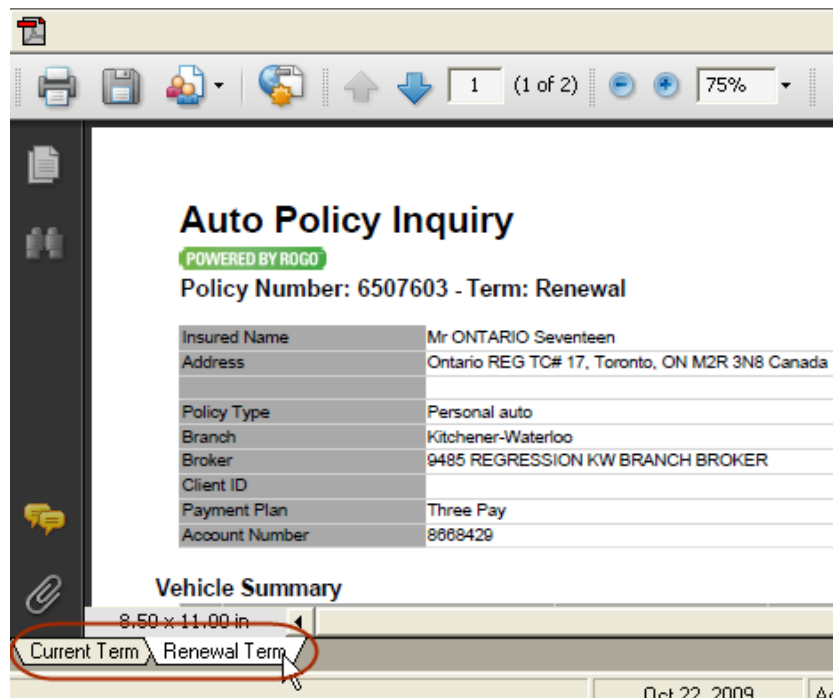
- b. Select or enter an **End Date** for the inquiry.



- The Inquiry results will open in the **Document window** in **PDF format**.

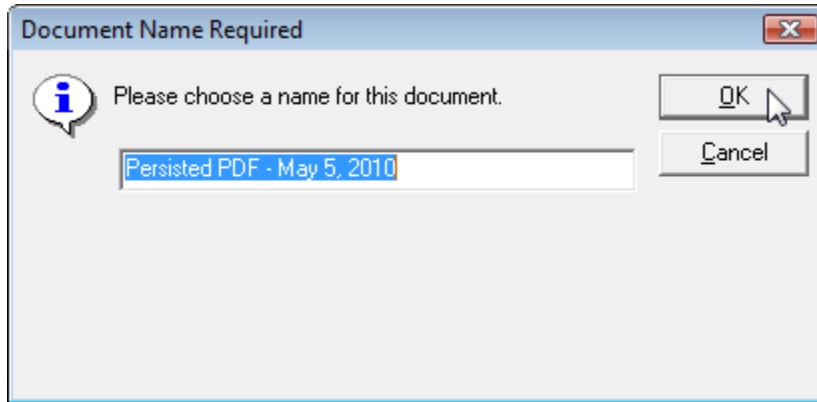


Note: For Policy Inquiry only: If a Renewal Term version of the policy has already been released by TEIG, both **Current Term** and **Renewal Term** inquiry results will be available in PDF format. Click the relevant tab to view details.



- To save the document to a client folder, click the **PDF** button in the top left corner of the Document Window, enter a name for the document, and click **OK**.

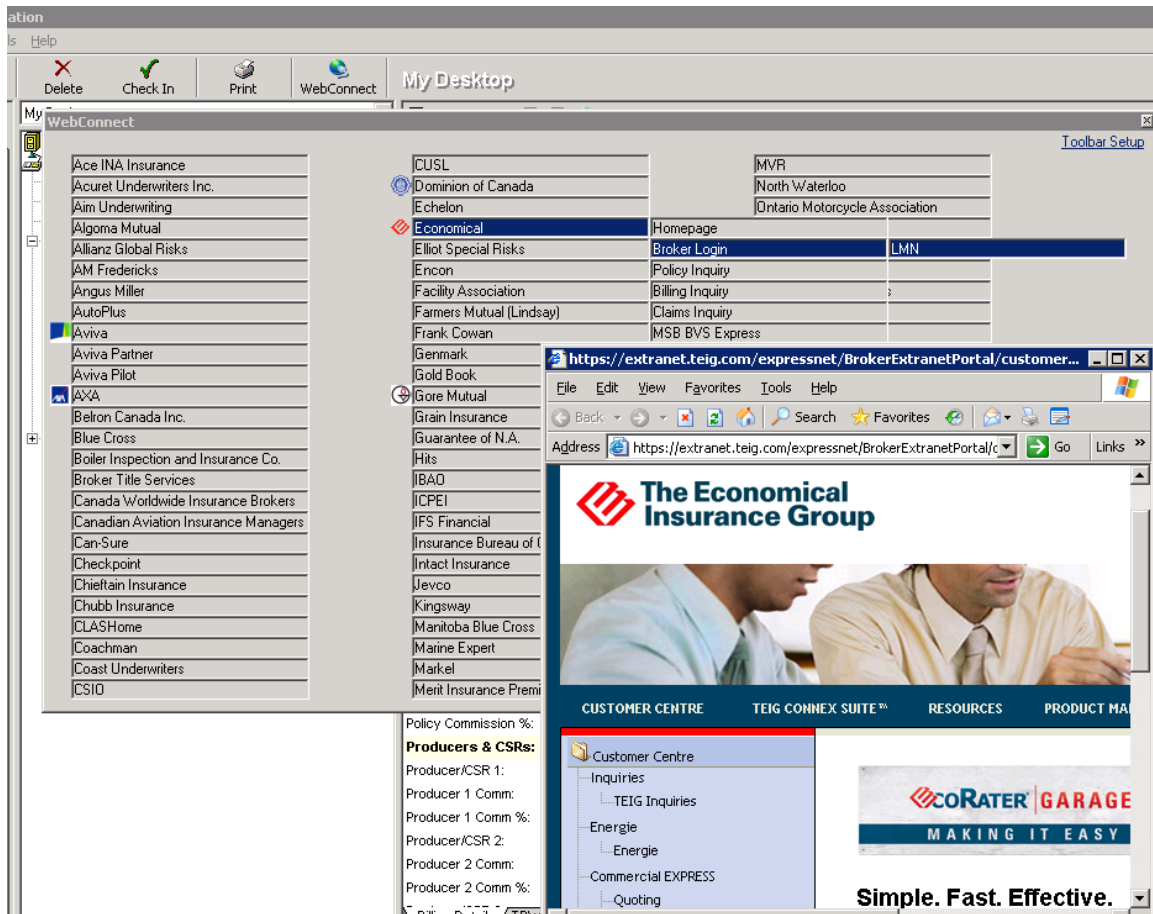
Note: For a Policy Inquiry Only - For those policies with both Current and Renewal Term PDFs, each document must be saved separately to the client folder.



The saved document will appear in the **Document Window** and in the **Desktop Tree**. For those inquiries done directly from an existing TEIG policy, the saved PDF documents will appear directly under the corresponding policy for that client.

Accessing The Broker Extranet from WebConnect

1. Click the **WebConnect**  button on the **TBW** toolbar.



2. In the **WebConnect** window, click **Economic**, and then select **Broker Login** and then your **User Name/ID**.
3. The user will be immediately brought to The Broker Extranet via single sign-on.