

The logo features a large white circle with a thick teal border. A dark blue arc starts from the left, passes behind the white circle, and ends at the bottom. A teal horizontal bar extends from the right side of the white circle. A white arc with two teal dots is positioned above the circle.

PROLINK

Canada's Insurance Connection

**ONLINE APPLICATION
USER GUIDE FOR CLIENTS**



INTRODUCTION

PROLINK—Canada's Insurance Connection is focused on improving traditional insurance transactions by delivering innovative digital experiences. To serve our clients better, we have partnered with Indio Technologies to deliver a brand new digital application portal:

- Easier faster application process;
- Less paper and paperwork;
- See last year's applications (unless you are a new client);
- And next year, your information will prepopulate in the forms, so all you'll have to do is review and edit.

While Indio is relatively easy to use, we prepared this user guide in case you need additional clarification.

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PART ONE – LOGGING IN TO YOUR APPLICATION

STEP 1

To access the Indio log in screen, **click on the “Launch My Application” button** found in the email you received from your Account Representative.

To begin your application, please click on the button below.



STEP 2

Enter the same email address that received the link to log in.

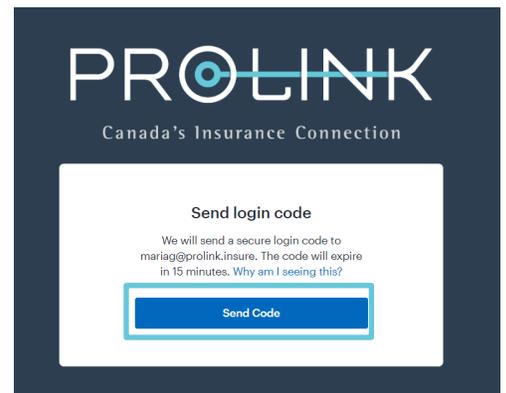
Click **“Continue”**.



STEP 3

To protect your privacy, Indio uses multi-factor authentication. This means you'll receive an authentication code sent to your email each time you log in.

To receive the code, **click the “Send Code” button**.



STEP 4

Check your email for a 5-digit code.

- Note that your login code will expire in 15 minutes.
- If you exceed the 15 minute window, follow steps one to three to obtain a new login code.

Log in to PROLINK Insurance

Enter this code to log into prolink.useindio.com

80030

This code will expire in 15 minutes.

If you did not attempt to log into PROLINK Insurance's Insurance portal, please ignore this email.

STEP 5

Toggle back to the log in screen on your browser and **enter the login code** to access your application.

To log back into your application at a future date, follow Steps One to Five.



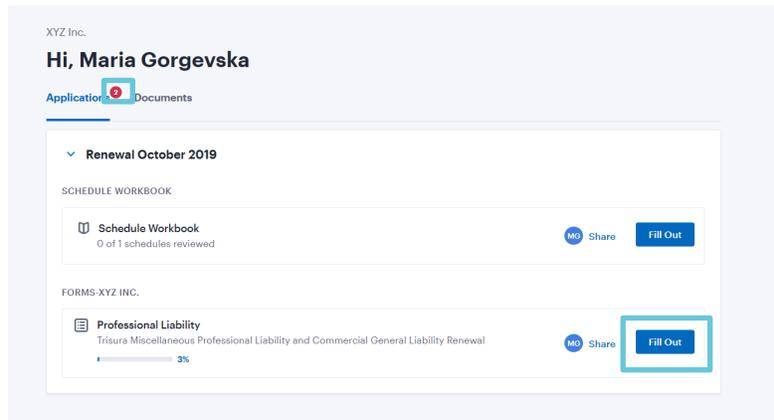
PART TWO – COMPLETING YOUR APPLICATION

GENERAL:

1. After logging in, you will see a dashboard with multiple tabs that contain all of the materials needed to complete your application.

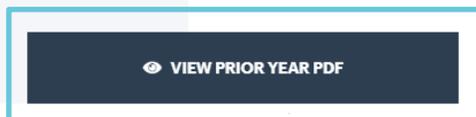
The tabs that need your attention have a red notification in the top right corner.

2. To begin completing an application, click the blue “Fill Out” button.

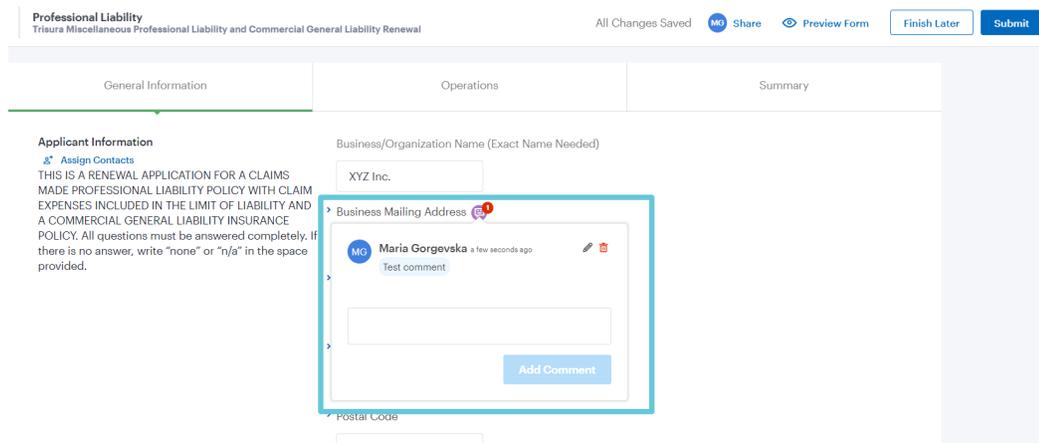


COMPLETING FORMS:

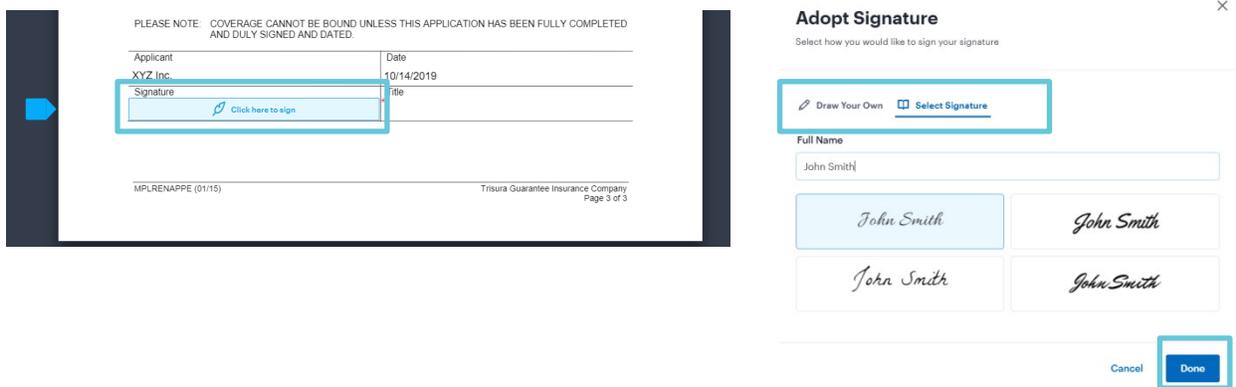
1. To access a form, click on the blue “Fill Out” button. Answer all the questions in the form.
2. If you have an existing account with PROLINK, you can view last year’s application within the form by clicking the “View Prior Year PDF” button found in the bottom left corner of your browser.



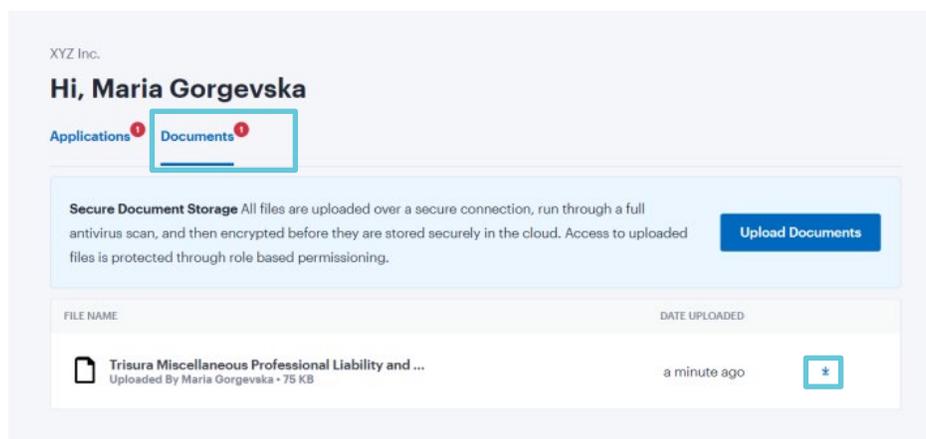
3. To write a comment on any question, hover over the question until a purple comment box pops up. There, you can write any supplementary comments.



- If you begin your application, but do not have time to complete it, click the **“Finish Later”** button in the top right corner to save your progress. You can go back to complete your form at any time.
- Once you have filled in all of the form fields and are satisfied with your application, click **“Submit”** in the top right corner.
- After clicking “Submit”, you will be asked to certify that all of the information you have entered is true. If the application is complete, click **“Accept”**. To go back and confirm any of your answers, click **“Cancel”**.
- After clicking “Accept”, you will be asked to e-sign your completed application. **Scroll to the bottom of the application to find the signature field**. Draw in your signature with your mouse, or select an e-signature. After you have made your selection, click **“Done”**.

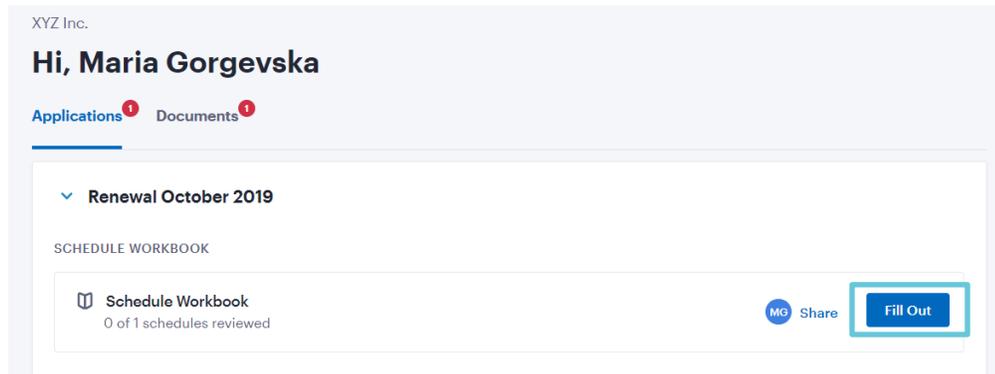


- Click **“Finish”** in the bottom right corner of your browser window.
- Your completed application will now appear in the **“Documents”** tab in the main dashboard. There, you can **download the application by clicking on the blue arrow**.



COMPLETING SCHEDULES (ITEMIZED LISTS):

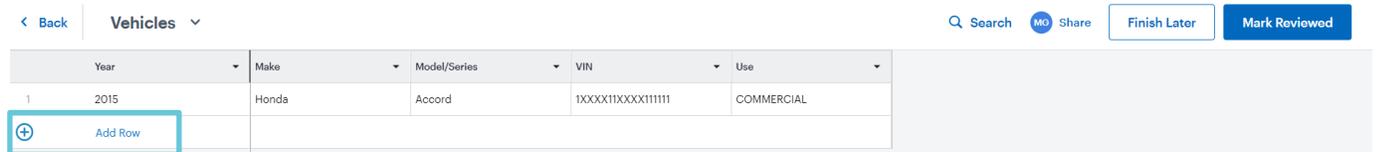
1. To access your schedules, go to the main “**Applications**” tab, and under “Schedule Workbook”, click “**Fill Out**”.



2. To review your schedules, click “**Review**”. You must review each schedule individually.



3. To change any information, simply click on any field and start typing. To add more items, click “**Add Row**”.



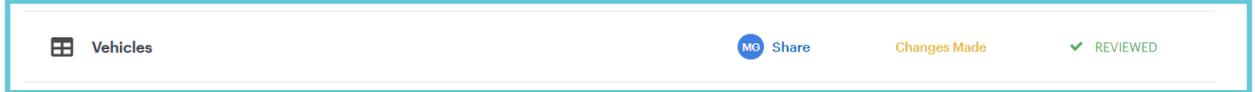
4. If you begin reviewing your schedule, but do not have time to complete it, click the “**Finish Later**” button in the top right corner to save your progress.



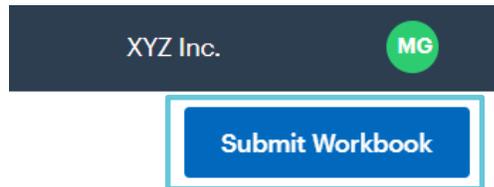
5. Once you have reviewed your schedule and made any applicable changes, click “**Mark Reviewed**” in the top right corner.



- If you need to make any changes after clicking “Mark Reviewed”, click anywhere on the schedule (see blue box below). Make any changes as described in step three above. When you are done, click **“Mark Reviewed”** again.

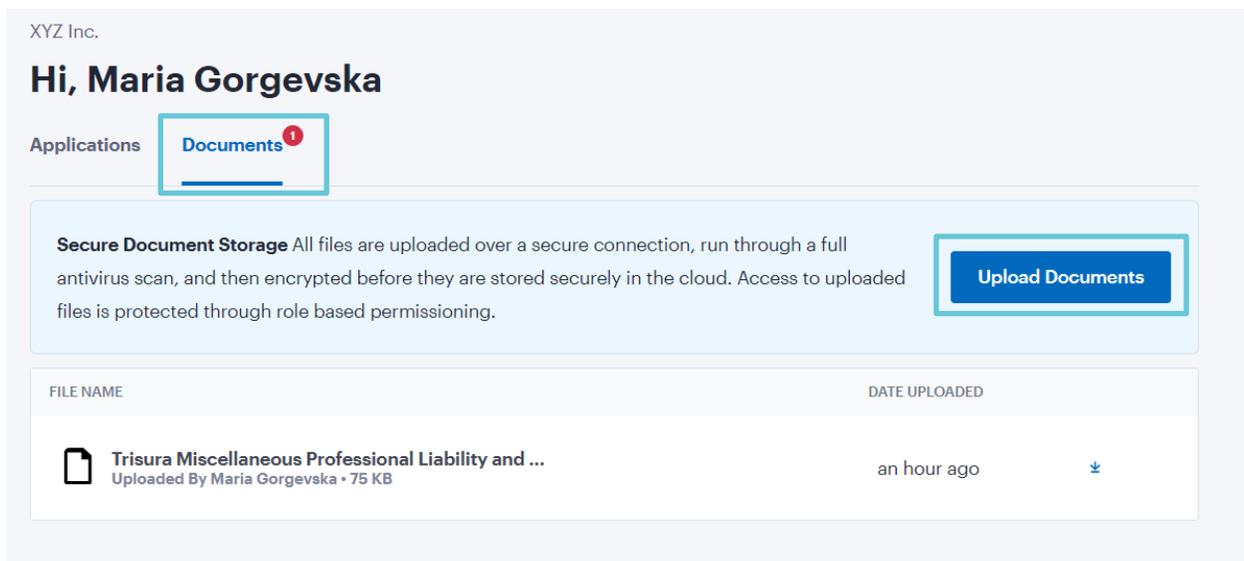


6. After reviewing all schedules, click **“Submit Workbook”** in the top right corner.



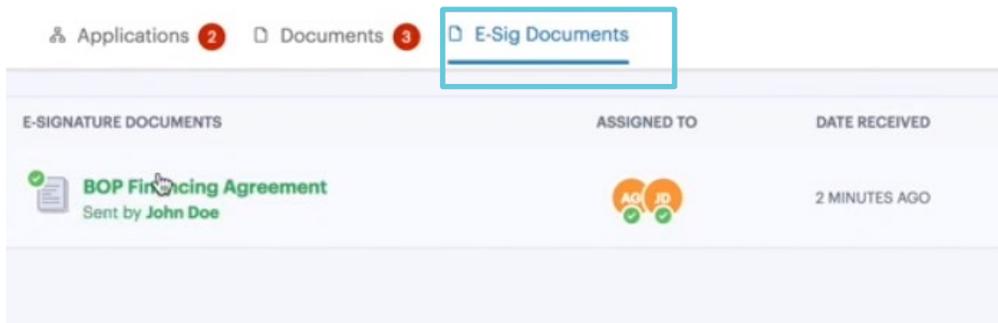
UPLOADING SUPPLEMENTARY DOCUMENTS:

1. To upload any supplementary documents, navigate to the **“Documents”** tab and click **“Upload Documents”**.

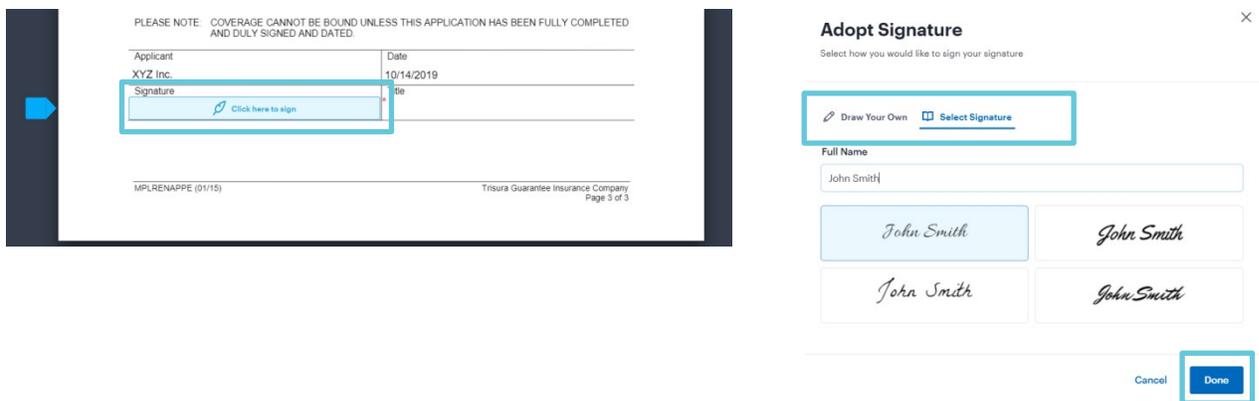


E-SIGNING DOCUMENTS:

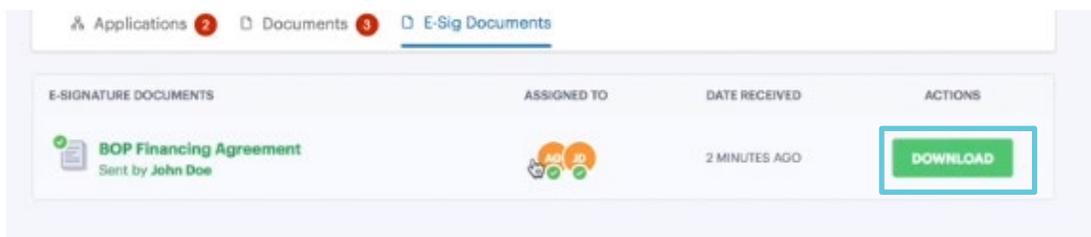
1. If your Account Representative needs you to e-sign any supplementary waivers or letters, you will see an additional tab next to “Documents”, called **“E-Sig Documents”**. Click on this tab to see which documents need to be signed.



2. Click on the document that needs to be signed to open it.
3. After opening the document, **find the signature field**. Draw in your signature with your mouse, or select an e-signature. After you have made your selection, click **“Done”**.



4. Click **“Finish”** in the bottom right corner of your browser window.
5. The signed documents will appear in your E-Sig Documents tab. You can also download the document at this point by clicking on the green **“Download”** button.



PRIVACY STATEMENT

Doing business with a Property and Casualty (P&C) Insurance Broker involves providing information about yourself, so the protection of your personal information is one of our highest priorities. Take a look at our detailed [Privacy Policy](#) to see how we protect your data.

Important Note: Any data entered on the Indio application platform is stored on a secure Indio Technologies server based in Montreal, Canada. However, while you submit the data, please be advised that it is routed through a server located in the United States.

As a result, using the platform comes with a small risk related to the [US Patriot Act](#), which stipulates that the US government can subpoena any business records they believe to be associated with terrorism or other national security threats.

If you have any concerns about using the platform, please let us know.