Chubb Personal Risk Services Centre
Frequently Asked Questions - April 2020

This updated document will guide you through the Personal Risk Service Centre options available to you to respond quickly and effectively while working remotely as a result of COVID-19.

Effectively immediately, our Personal Risk Service Centre team is offering full servicing options including our phone service and our Customer Service Representatives are available to take your calls remotely. Please continue to use the @ChubbCanada Brokersite for transacting business online and by email at plsc.online@chubb.com. Please follow our helpful tips outlined in the FAQ below when contacting the Personal Risk Services Centre.

How do I get access to the @ChubbCanada Brokersite?

To set your brokerage up with site access, please visit the @ChubbCanada Brokersite and click on "Request Access" under the log-in screen. You will need your broker code/producer number to register. Please note that it can take up to two business days to complete initial set up. Once complete, the administrator will be notified by the Personal Risk Service Centre that access is complete.

The @ChubbCanada Brokersite administrator for your brokerage will now have the ability to grant and disable user access to all staff within your brokerage. If you are experiencing issues with setting up your site access, please call us at 1-800-465-6391 or email us at plsc.online@chubb.com.

How do I reset my @Chubb Canada Brokersite password?

You can easily reset your password from the @ChubbCanada Brokersite log-in page. Please update your password immediately, as the temporary password is only active for 24 hours. If your account has been deactivated due to inactivity, or you require additional assistance, please email caz-admin-online@chubb.com.

How do I stay up-to-date on Chubb information?

All Chubb communications will be posted to the News Flash section of the @ChubbCanada Brokersite. We also invite you to sign up for our broker email list for communication, event and training invitations. Please fill out your profile here.

How do I quote new clients or new lines of business with Chubb?

By Phone or Email:

Step 1:

- Complete the Chubb New Business Application.

Step 2:
By Phone:

- Call the Personal Risk Service Centre at 1-800-465-6391

By Email (plsc.online@chubb.com):

- Use the following subject line template to help us prioritize effectively: *"Effective Date – New Client Quote/New Line Quote – Replacement Cost of Primary – Lines of Business – Last Name"*
- Example:
  - *"5/1/20 – New Quote - $3M Home – Property, VAC, Excess – Smith"*
- Send your request to plsc.online@chubb.com.

IMPORTANT:
New business email requests following the above subject line template along with a completed new business application will be prioritized. If your new business request is time sensitive, please indicate this in the subject line of your email.

By @ChubbCanada Brokersite:

- The @ChubbCanada Brokersite will allow you to set up new business quotes for current and existing clients.
- If your quote is set up through the email process as noted above, you can view it on the @ChubbCanada Brokersite once the quote has been completed.

How do I bind coverage and issue a policy for my client?

Please consult the Chubb Binding Guidelines section in your provincial Rate & Rule manuals located on the @ChubbCanada Brokersite. Current Rate & Rule manuals can be located under the "Reference Library" section in the "Rate and Rules" section. Binders of coverage may be provided for up to 30 days, subject to Chubb's binding guidelines.

IMPORTANT:
Chubb Access Canada brokers do not have binding authority.

To issue a policy:

Step 1:

- Determine the Billing Method:
    - Credit Card Billing: Client Credit Card Information Broker Reference Guide
    - Agency Bill or Pre-Authorized Chequing: Include billing information and payment instructions in your issuance instructions

Step 2:
By Phone:

- Call the Personal Risk Service Centre at 1-800-465-6391

By Email (plsc.online@chubb.com):

- Send issuance instructions to the Personal Risk Service Centre at: plsc.online@chubb.com.
- Use the following email subject line:
  "Effective Date – Issuance – Quote Number – Lines of Business - Last Name"
    - Example:
        - *"5/1/20 – Issuance – 31234567 – Property and Auto – Smith"*
- Provide confirmation of all limits/deductible to be issued
- Provide any subjectivities listed in the quote email
    - ex/ Overland Water questions, Driver's Licence Numbers for household drivers, client contact information, prior policy number, Letters of Experience, etc.

Step 3:

- Once your request has been submitted, the Personal Risk Service Centre will pull any necessary reports and refer to underwriting for final review, if necessary.

Step 4:

- Once issued, policy details and documents will be available overnight through EDI/eDocs Download (if applicable) and on the @ChubbCanada Brokersite.

How will I receive and view policy documents, inspection reports, and Pink Slips?

- Digital policy documents are provided through eDocs and can be obtained through the @Chubb Canada Brokersite. Please note at this time, miscellaneous vehicle policy documents are not available on the Brokersite (and can be forwarded via email request to our PRSC team at plsc.online@chubb.com).
- The mailing of hard copy documents may be temporarily suspended during this time. You will be notified should Chubb decide to suspend printing of policy documents.
- Should Chubb suspend printing for a temporary period, we ask that you please make arrangements with your clients to deliver digital copies of policy documents by email or online, and ask for their consent before doing so.

How do I enroll in Chubb Download?

Chubb's Download Services provide nightly transmission to your CSIOnet account through:

- EDI policy data and invoicing/billing changes and an option to include active quotes
- eDocs – client copy of policy documents in pdf format

To set up download services, please refer to the Chubb Download Service Guide on the @Chubb Canada Brokersite under "Reference Library" in the "Training Material" section. For technical assistance, please email cazwebappsupport@chubb.com.

How do I request endorsements, cancellations, renewal quotes, or other changes to my client's policies?

By Phone:

- Call the Personal Risk Service Centre at 1-800-465-6391

By @ChubbCanada Brokersite:

- The @ChubbCanada Brokersite has endorsement templates for our most common endorsement requests such as adding a vehicle, substituting a property, updating a mortgagee, and many more.
- When you open a client's policy in the Brokersite, you will see "Endorse" on the right side of the screen. Click this button and the system will prompt you through the changes.

By Email:

- Alternatively, you may send your request to the Personal Risk Service Centre via email at plsc.online@chubb.com. You must include the client's name, policy number, the effective date of your change request, and specific details on the transaction you would like processed.
- Use the following subject line format:
    - *"Effective Date – Transaction type (Endorsement, Cancellation, Renewal Quote, Etc.) – Policy Number – Lines of Business - Last Name"*
        - *"Example: "5/1/20 – Endorsement– 31234567 – Property Sub – Smith"*

How do I update an existing client's billing?

- Determine the Billing Method:
    - Credit Card Billing: Client Credit Card Information Broker Reference Guide
    - Agency Bill or Pre-Authorized Chequing:
        - By Phone: 1-800-465-6391
        - By Email: Include billing information and payment instructions in your email to plsc.online@chubb.com.

How do I submit a Broker of Record request to Chubb?

Chubb's Change of Producer guidelines can be found on the @Chubb Brokersite under on the @Chubb Canada Brokersite under "Reference Library" in the "Training Material" section. Documents can be submitted to plsc.online@chubb.com.

Other resources and training materials available on the @ChubbCanada Brokersite

Chubb Updates
- Newsflash section on the Home Page

Manage Billing
- Declined Charges
- Expired Credit Cards
- Returned Payments

Reference Library

- Contract Guides
    - All Provinces and Products

- Rate & Rules
    - Binding Guidelines
    - Broker Binding Procedures
    - Property, Auto, Watercraft

- Marketing Catalogue (highlights)
    - Chubb – New Business Application
    - Overland Water FAQs
    - Chubb Masterpiece Product Highlights

- Training Material (highlights)
    - Your Clients' Credit Card Security
    - Chubb Primer – Working with Personal Risk Services
    - Payment Plans
    - Chubb Download (EDI & eDocs) Reference Guide

- Webcasts (highlights)
    - Market Trends – March 2020
    - New Enhancements to Client Credit Card Security
    - @ChubbCanada Brokersite Overview
    - @ChubbCanada New Business Quoting

How do I contact Chubb Claims?

When something happens to your client, they deserve a carrier who treats them with empathy and compassion. Chubb adjusters are trained to respond to claims within 24 hours, and, once approved, to issue payment within 48 hours.

We look for ways to do more for our clients across every step of their experience, to make them whole quickly on their terms.

To submit a claim, email canadaclaims@chubb.com or call 1-800-532-4822.

Chubb. Insured.℠