FIRST INSURANCE® OF CANADA — FUNDING
A WINTRUST COMPANY

# FirstInSite Enhanced FAQ

## 1

### *Why is First InSite changing?*

We are expanding the functionality of First InSite as part of our commitment to deliver on our innovation promise. First InSite Enhanced will equip you with the ability to easily and conveniently offer payment options and now also includes eSignatures, integrated credit card payments, paperless workflows, and reporting.

This new platform will also allow us to more easily provide technological improvements in the future, like integrations and more payment methods.

## 2

### *Is this a trial or pilot?*

This is a permanent change. It will not be necessary to access the old system after you migrate to First InSite Enhanced.

## 3

### *When do I get to use First InSite Enhanced?*

All brokers will be converting to First InSite Enhanced. You will be contacted by your **Relationship Manager** when you are eligible to move to the new system.

## 4

### *Are there specific system requirements to use First InSite Enhanced?*

First InSite Enhanced is cloud based and independent of your operating system. It is compatible with your current system.

## 5

### *Will training be provided? What if I have additional questions?*

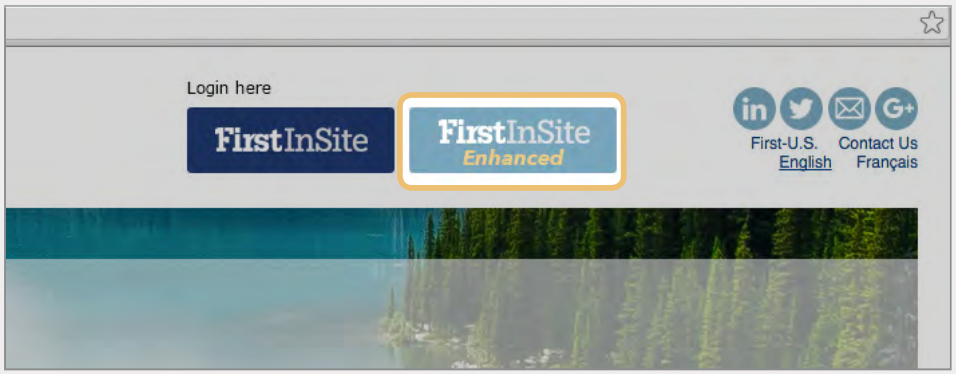
Your **Relationship Manager** will be happy to provide in-office training.

We also have online training guides on our website for your reference.

## 6

### *How do I access First InSite Enhanced?*

When your brokerage has been upgraded, you can access the system by visiting **enhanced.firstinsite.ca** or by clicking on the First InSite Enhanced button on our **home page**. Be sure to update any old bookmarks or shortcuts **prior** to entering your login information.



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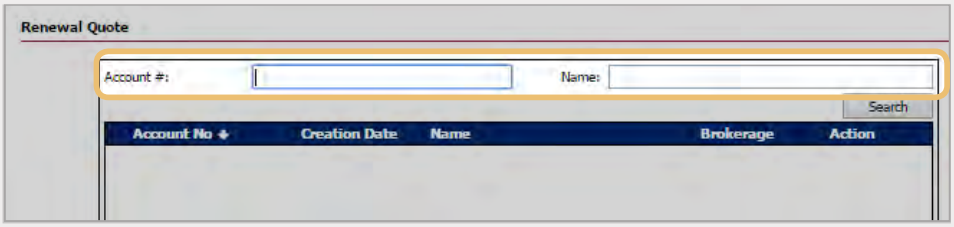
## 7

### *Will my renewals be available in First InSite Enhanced?*

Yes. Your renewals will be in First InSite Enhanced and can be easily searched by account number or client name.




## 8

### *How can I get a U.S. Currency Quote?*

Call your **Account Manager** and they will be happy to help you.

## 9

### *How can I process a positive endorsement on an existing loan in the previous system?*

Contact our **Client Services** team for assistance.

## 10

### *How can I process a Returned Premium (Negative Endorsement)?*

To process a negative endorsement, mail us a cheque with a cover note, including client's name and account number.

## 11

### *How do I know when my existing loans in the previous system are being funded?*

Contact our **Client Services** team with any funding inquiries on existing loans in the previous system.

## 12

### *How can I print notices for existing loans in the previous system?*

Our **Client Services** team will be happy to send you any notices pertaining to existing loans in the previous system.

## 13

### *How do I check my client's payment schedule for existing loans in the previous system?*

Our **Client Services** team can provide you with all payment schedules you require.