



Playbook

Simplify new business. Amplify your returns.

www.victorinsurance.ca/vsquared

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V² for New Business

QUOTE, BIND & ISSUE IN MINUTES

We've combined decades of underwriting expertise with cutting-edge technology to save you time and money.

SUPERIOR

We offer market-leading coverage at your fingertips, and back that up with enhanced underwriting services to make sure you get the right fit for your clients.

SIMPLE

Policy writing has never been so easy. V² offers a streamlined application process so you can manage your new business anywhere, anytime.

START WITH VICTOR

Make Victor your first step. Get a quote in minutes and a pre-filled application you can download for your records.

FAST

In many cases, you only need to answer 4 questions to get a new business quotation online. Quotes can then be bound and issued instantly in V².

LET US HELP YOU GROW YOUR BUSINESS

Register at www.victorinsurance.ca/vsquared to start quoting and issuing coverage for your clients right away.



Navigate the Dashboard

The dashboard features a top navigation bar with 'Home', 'My Work', and 'Administration' tabs. Below this is a 'Get Started' section with four 'Start a new quote' buttons for different categories: IT - Small Firms, A&E - Small Firms, D&O - Non-Profit, and Construction - Small Projects. A 'Queue' section follows, with a 'Most Recent' tab selected and a 'Currently in Underwriting Review' tab. The 'Most Recent' tab displays a table of account entries. Below the table are three summary tiles: '3 In-Progress', '1 Quoted', and '1 Referral - Pending Review'. The footer contains 'Customer Support' contact information and 'Additional Resources' links.

Click here to start a new application

Visit My Work to view a complete list of all accounts entered on the system

A snapshot of accounts currently with your underwriter

View your latest accounts & their status

Click on any of these tiles to view a list of your *In-Progress*, *Quoted* & *Referral – Pending Review* accounts

ID	Company Name	Status	Policy Type	Coverage	Creation Date
7407	M & N Construction	In-Progress	Construction - Small Projects		21-Apr-2023
7406	Insurance Portal Experts	Quoted	IT - Small Firms		21-Apr-2023
7404	Phil's IT Consultants	Issued	IT - Small Firms	Errors and Omissions	21-Apr-2023
7405	Phil's IT Consultants	Issued	IT - Small Firms	Commercial General Liability	21-Apr-2023
7402	Saskatchewan Agro Association	Issued	D&O - Non-Profit	Directors and Officers Liability	21-Apr-2023

ID	Company Name	Status	Policy Type	Creation Date
7399	O'Shea Software Programming Inc.	Referral - Pending Review	IT - Small Firms	21-Apr-2023

Navigate *My Work*

The screenshot shows the 'My Work' dashboard interface. Callouts highlight the following features:

- Filter your list of accounts:** A callout points to the filter menu at the top left, which includes 'Policy Type', 'Status', 'Sort By', 'Search Options', and 'My Filters'.
- Search for accounts by company name:** A callout points to a search bar with the placeholder text 'Search for a company by name (3 character minimum)'.
- Return to your Dashboard:** A callout points to the 'My Work' tab in the top navigation bar.
- Assign colleagues to create & access accounts on your behalf:** A callout points to the 'Administration' tab in the top navigation bar.

The main content area displays a table of work items:

ID	Policy Type	Policy / Project Number	Coverage	Company Name	Location City	Province	Effective Date	Expiration Date	Status	Assigned Broker
7407	Construction - Small Projects	153817		M & N Construction	Moncton	NB			In-Progress	Amy Lepage
7406	IT - Small Firms			Insurance Portal Experts	Ottawa	ON			Quoted	Amy Lepage
7405	IT - Small Firms	TGL612627	Commercial General Liability	Phil's IT Consultants	Vancouver	BC	26-Apr-2023	26-Apr-2026	Issued	Amy Lepage
7404	IT - Small Firms	TIP612627	Errors and Omissions	Phil's IT Consultants	Vancouver	BC	26-Apr-2023	26-Apr-2026	Issued	Amy Lepage
7403	D&O - Non-Profit	CGL612626	Commercial General Liability	Saskatchewan Agro Association	Regina	SK	21-Apr-2023	21-Apr-2024	Issued	Amy Lepage
7402	D&O - Non-Profit	NP-612626	Directors and Officers Liability	Saskatchewan Agro Association	Regina	SK	21-Apr-2023	21-Apr-2024	Issued	Amy Lepage
7401	A&E - Small Firms			Douglas & Douglas Engineering	Canmore	AB			In-Progress	Amy Lepage
7400	A&E - Small Firms			Lakeshore Engineering Ltd.	Toronto	ON			In-Progress	Amy Lepage
7399	IT - Small Firms			O'Shea Software Programming Inc.	Winnipeg	MB			Referral - Pending Review	Amy Lepage

A callout points to the row for ID 7400, indicating that accounts can be opened individually to view details and make changes.

Administration – Multiple Offices & Delegates

If you are a manager and would like the ability to assign delegates for your staff, contact vsquared.ca@victorinsurance.com

If you place business through multiple offices, please contact us at vsquared.ca@victorinsurance.com

The screenshot shows the 'Administration' section of the Victor Insurance portal. The navigation bar includes 'Home', 'My Work', 'Administration', 'Get Started', and 'Amy Lepage'. The main content area is divided into two sections: 'Choose your office' and 'Add or Cancel Delegation'.
1. 'Choose your office': A section with a teal header. Below the header, it asks the user to 'Please select the office location you wish to assign/cancel delegates for:'. There are two office entries: 'ABC BROKERS [012174] 101 MAIN ST OTTAWA, ON K1K 1K1' and 'ABC BROKERS [012176] 190 ORLEANS BLVD ORLEANS, ON K1K 1K1'. The second office is highlighted in blue and labeled 'Primary'.
2. 'Add or Cancel Delegation': A section with a teal header. Below the header, it asks the user to 'Select the person(s) you would like to issue policies on your behalf:'. There are two columns: 'Available delegates' and 'Selected delegates'.
- 'Available delegates' contains one entry: 'Joseph Smith (joes@gmail.com)'.
- 'Selected delegates' contains one entry: 'Robert Dixon (robert.dixon@gmail.com)'.
Between the columns are four arrow buttons: a double right arrow, a single right arrow, a single left arrow, and a double left arrow.
At the bottom of the page, there is a light blue banner with the text: 'Unable to see your delegate? Please contact vsquared.ca@victorinsurance.com for assistance.' and a 'Save' button.

Assign colleagues to create & access accounts on your behalf

Colleagues who have obtained portal access will appear in the list

Additional Insureds & Certificates of Insurance

Home My Work Administration Get Started

Coverage is not in place until you select 'Issue Policy'.

Please Note: To change your decision to add Additional Insureds / Certificate Holders, simply return to the previous page and change your selection to "No".

Additional Insureds / Certificate Holders

Name	Address	Certificate	Add'l Ins	With 30d Canc	Waiver of Subrog	Landlord
No additional insureds entered for this work item						

Additional Insureds

* Name

* Address Line 1

Address Line 2

* City

* Country

* Province

* Postal Code

* Does the above require only a certificate of insurance? Yes No

* Is this an Additional Insured? Yes No

* Does the above require a 30-day Notice of Cancellation? Yes No

* Does the above require a Waiver of Subrogation? Yes No

Add Cancel

If the entity only requires proof of insurance, a certificate will be issued for both Professional Liability & CGL

If the entity requests to be an Additional Insured on the CGL coverage, a certificate will be issued and the CGL policy will be endorsed

If the entity requires a waiver of subrogation on the CGL coverage, a certificate will be issued and the CGL policy will be endorsed

Access Policy Documents

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'My Work', 'Administration', 'Get Started', 'Amy Lepage', and 'English'. Below the navigation bar, there is a 'Client Information' section for 'Stanley & McGowan Engineering' with client number 409097 and address 101 Wheat Lane, Regina, SK S0S 0S0. The 'Policy Information - Coverages (at the time of Issuance)' section is divided into two columns: 'Professional Liability' and 'Commercial General Liability'. The 'Professional Liability' table shows policy number SFE543446, term 07-Mar-2020 to 07-Mar-2023, limits of \$250,000 (Per Claim Limit) and \$500,000 (Annual Aggregate Limit), a \$0 deductible, a total premium of \$4,620, and a status of 'Issued'. The 'Commercial General Liability' table shows policy number CGL543446, term 07-Mar-2020 to 07-Mar-2023, limits of \$1,000,000 (Each Occurrence Limit) and \$1,000,000 (Annual Aggregate Limit), a \$1,000 deductible, a total premium of \$1,485, and a status of 'Issued'. Below this is an 'Additional Insured(s) / Certificate Holder(s)' table with columns for Name, Address, Certificate, Additional Insured, With 30d Clanc, Waiver of Subrog, and Landlord. It lists ABC Company, DEF Company, and OHI Company. A total of 3 additional insureds/certificate holders is noted. An 'Exit' button is located at the bottom right of the main content area.

This is a smaller version of the 'Policy Documents' sidebar, showing a list of document types with their respective file sizes and a 'Refresh' button at the bottom.

This is a larger, detailed view of the 'Policy Documents' sidebar. It lists the following documents with their file sizes and status:

- Application (17 KB)
- Quotation (66 KB)
- Highlight Sheet - AE (627 KB)
- Billing Summary (Document generating...)
- Policy Package PL (Document generating...)
- Certificate(s) PL (Document generating...)
- Policy Package GL (Document generating...)
- Certificate(s) GL (Document generating...)
- Claims Process (416 KB)
- Claims Reporting (398 KB)
- ENCON is now Victor! (220 KB)

A 'Refresh' button is located at the bottom of the list.

Documents are available for download as you proceed through quoting and policy issuance

Account Status Types

AMENDED POST ISSUE

Mid-term servicing is handled outside of the portal; if a policy is endorsed mid-term, the status will be updated. For certain amendments (Named Insured, Address, Policy Period), these details will be updated in the portal.

BROKER CHANGE

If the account is transferred to another brokerage, the status is updated and the work item becomes read-only.

CANCELLED, REINSTATED

If the account is cancelled mid-term or subsequently reinstated, the status is updated.

DECLINED

An account which was referred and subsequently declined. The work item becomes read-only.

IN-PROGRESS

An account you are currently working on. All work is automatically saved as you go.

ISSUED

The policy is in-force and issued.

LAPSED

An account which has lapsed at renewal.

QUOTED

A quote has been provided to you. You may bind and issue the policy at any time.

QUOTE EXPIRED

The quote we provided has expired. You may enter the account into V² again to get a new quote.

REFERRAL – PENDING REVIEW

The account requires review by an underwriter before a quote can be released. All accounts referred to an underwriter are addressed within one business day; most are addressed within minutes.

REFERRED

An account which has been referred and subsequently quoted outside of the portal; the work item's details become 'read-only'.

RENEWED

An account which has renewed.

Frequently Asked Questions

1. How do I save and exit when I'm working in V²?

V² saves your work as you pass through each page. If you navigate off of your current page, it will prompt you to save.

2. My client needs to show proof of insurance for a contract.

You can obtain a certificate of insurance during the course of issuing the policy. For requests post-issuance, please email us at vsquared.ca@victorinsurance.com.

3. How do I make changes to my client's name or address?

Please email us at vsquared.ca@victorinsurance.com.

4. Can I do renewals in V²?

At this time, V² is a new business portal. We are already working to include renewals in future enhancements of V².

5. The filter function in My Work is not returning the desired results. How do I fix this?

When using filters, make sure you delete previous filters before moving on to another filter type.

6. What if I need to make changes to the policy mid-term?

Please email us at vsquared.ca@victorinsurance.com.

7. Who do I contact if I need assistance?

Please email us at vsquared.ca@victorinsurance.com if you have any technical or underwriting questions. Alternatively, you can contact us at 1-800-267-6684 and ask to speak with a member of the portal team.

About Victor

[Victor Insurance Managers Inc. \(Victor Canada\)](#) is a subsidiary of Victor Insurance Managers LLC and a leading managing general agent in Canada. Victor Canada has a rich history in specialty insurance, and offers a unique range of products and programs distributed through independent brokers and advisors. With specialized underwriting and claims expertise, the company provides a wide range of insurance solutions—from specialty property and casualty and professional liability insurance to group and retiree benefits.

Victor Insurance Managers LLC is the world's largest managing general underwriter with locations in the US, Canada, UK, Netherlands, Germany, Italy and Australia. It handles more than \$1.6 billion USD in premium on behalf of numerous insurance carriers, through a large network of more than 25,000 active insurance agents and brokers. Victor is committed to building on 60-plus years of experience to develop products that address risk in new and evolving areas.

For more information, visit: www.victorinsurance.ca.

