DASH>
DRIVER & AUTO SEARCH HISTORY

User Manual

IBC ✦ BAC

Foreword

Welcome to IBC's DASH – Driver and Auto Search History.

This manual includes information and instructions on how to use the DASH Portal. It will familiarize you with the functions in the DASH Portal, and the steps that are required to perform various tasks.

All of the functions described in this document may not be available to you; the functions accessible to you will depend on your authorization level and role. If you need access to functions that are not currently available to you, please contact your User Administrator.

The information provided in this document was accurate at the time of the publication. Insurance Bureau of Canada (IBC) reserves the right to modify the DASH Portal and issue new versions of the User Manual.

We urge you to read this document and carefully follow the described procedures. This will help ensure proper functioning and an enjoyable experience.

Version 10-20241120

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1 The Portal

The Portal provides a framework for accessing all DASH online functions. It allows you to log into and out of DASH, manage your password (if applicable), set language, and navigate through DASH functions.

This section also covers the use of cookies and access to various information pages within the DASH Portal.

1-1 Logging In

The DASH Portal requires all users to be authenticated. The authentication is performed based on the user's credentials; specifically, the user ID and password. Depending on how your company is set up, you may be using credentials issued by your company or by IBC.

Follow these steps to log in to the DASH Portal:

1. Open your browser and navigate to https://dash.ibc.ca.

> **NOTE**
> Depending on your company setup, if you are already logged in to another system with your credentials, IBC DASH may recognize your existing authentication and skip some of the following steps.
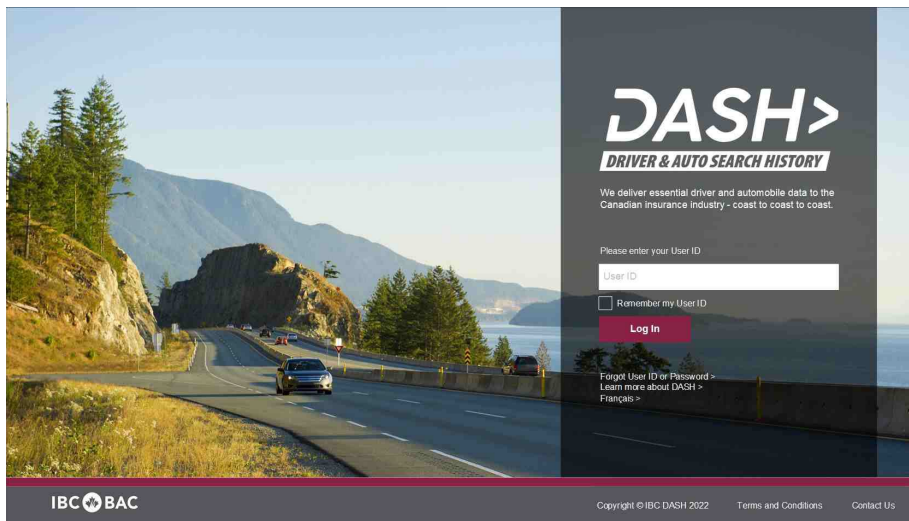
2. Enter your *User ID.*

> **NOTE**
> Depending on your company setup, your user ID may be your company email address. If you are using IBC-issued credentials, your user ID will have a format similar to this: *user.company.com@account.ibc.ca*

> **NOTE**
> You can use the "Remember my User ID" option if you want DASH to pre-populate your User ID the next time you visit the DASH login page. The User ID will be remembered on your current computer.

3. Click on the **Log In** button.
4. If prompted, enter your password.
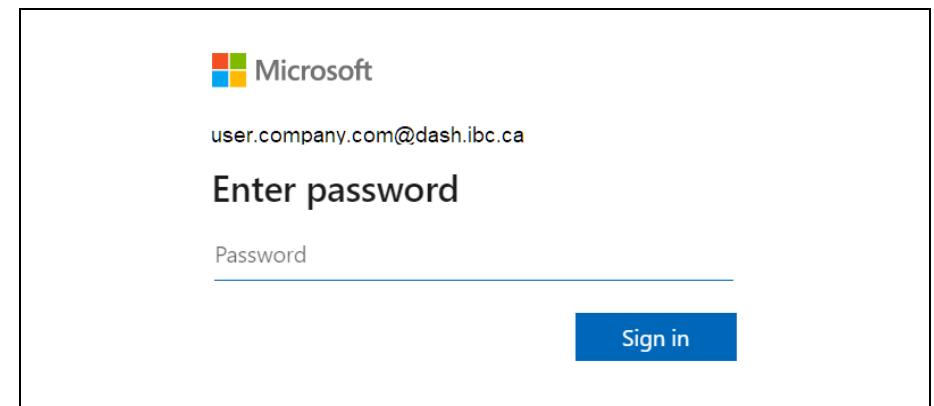
> **NOTE**
> The image above is for illustration purposes only. The actual Enter Password dialogue may appear differently.

5. If prompted, perform the multifactor authentication.

NOTE
Depending on your company setup, you may be prompted to perform the multifactor authentication, when necessary. The multifactor authentication can be performed through an authentication app on your smartphone, a text message or a voice call on your phone, depending on your account setup.

6. After completing the steps above, you will be logged in to the DASH Portal and presented with the landing page.
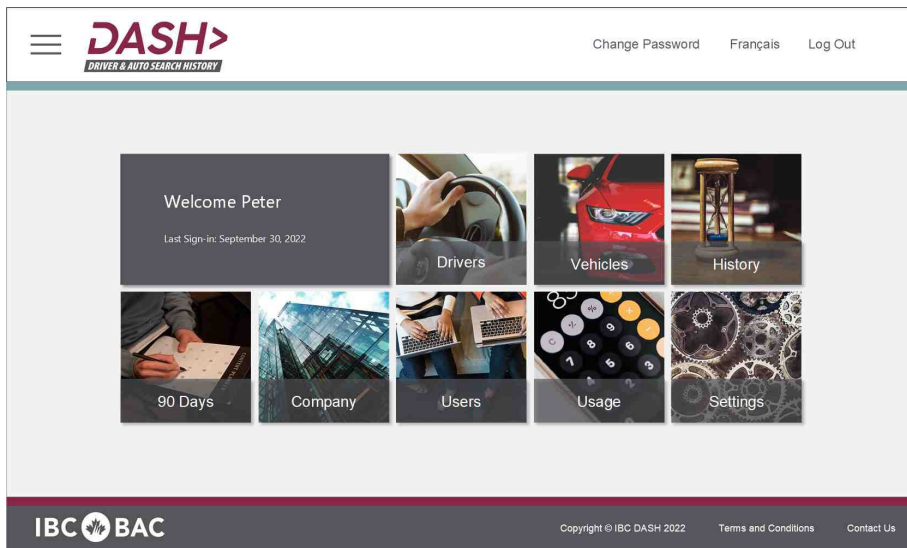
NOTE
The above image is for illustration purposes only. Your landing page may appear differently, depending on the DASH functions assigned to you.

TROUBLESHOOTING

- **You forgot your user ID or Password:** If you are using IBC issued credentials, please use the **Forgot User ID or Password?** link (see section 1-2). If you are using company credentials please contact your User Administrator.
- **You are prompted to perform multifactor authentication, but you don't have access to your phone:** For security reasons, you will not be able to access the DASH Portal until you perform the required multifactor authentication.
- **You have lost your phone or changed your phone number:** You need to update your multifactor authentication information. Please contact your User Administrator.

The Portal

First Login with Company Credentials

If you are using the company credentials, when your account is created you will receive the following email:

> Hello,
>
> Your DASH User ID is: **user@company.ca**
> To access DASH please follow this link: DASH Portal
>
> **Please do not reply to this message.**
> For any questions, please contact us at DASHSupport@ibc.ca
>
> Regards,
> DASH Team

1. Click on the DASH Portal link to navigate to DASH login page.
2. Follow the steps outlined in the first part of this section.

First Login with IBC Credentials

If you are using the IBC credentials, when your account is created you will receive the following email:

> Hello,
>
> Your DASH User ID is: **user.company.ca@account.ibc.ca**
> To complete your account setup please follow this link: DASH Portal
> This link will expire in 30 days and can be used only once.
>
> **Please do not reply to this message.**
> For any questions, please contact us at DASHSupport@ibc.ca
>
> Regards,
> DASH Team

1. Click on the DASH Portal link to navigate to the Verification Code page.

Verification Code

To verify your identity, we will send a verification code to the phone number linked to your account.
Simply click the **Send Code** button to request the code. It may take a few minutes for the code to arrive.

[Send Code]

Once you have received the verification code, please enter it into the box below and click **Next**.

[   ]

[Next]

2. Click on the **Send Code** button to request the verification code.
3. The verification code is sent to the phone number associated with your account. The code may take a few minutes to arrive.
4. Enter the verification code and click on the **Next** button to navigate to the Password page.

Password

Please enter a new DASH password below and click **Next**:

| New password | 👁 |
| Confirm new password | 👁 |

Next

The password must contain at least 3 of the following 4 character types:

- Uppercase letters
- Lowercase letters
- Numerals
- Special characters {[(@-#_$+%=^,&*'\`|:?'/~;!)]}

The password must contain between 8 and 64 characters.

---

5. Set your password for DASH by entering and confirming the *New Password*, and clicking on the **Next** button.
6. Confirmation page is displayed.

Confirmation

Your DASH password has been saved.
Click **Finish** to return to the DASH login page.

Finish

---

7. Click on the **Finish** button to return to the DASH login page.
8. From DASH login page, please follow the steps outlined in the first part of this section.
9. When prompted, click on **Accept** to allow the requested permissions:

Microsoft

user.company.com@dash.ibc.ca

Permissions requested

DASH SSO
unverified

This application is not published by Microsoft or your organization.

This app would like to:

∨ Sign you in and read your profile

∨ Maintain access to data you have given it access to

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at https://myapps.microsoft.com. Show details

Does this app look suspicious? Report it here

Cancel   Accept

The Portal

TROUBLESHOOTING

- **The link in the invitation email does not work:** The link expires in 30 days and can be used only once. Please contact your User Administrator.
- **I did not receive the verification code:** The verification code is sent to the phone number associated with your user account. Please contact your User Administrator and confirm that the phone number is correct.

1-2 Forgot User ID or Password?

The DASH Portal requires all users to be authenticated. The authentication is performed based on the user's credentials – the user ID and password. Depending on your company setup, you may be using credentials issued by your company or credentials issued by IBC.

Follow the steps below if you have forgotten your user ID or password:

> **IMPORTANT**
> The following steps apply only to users with IBC-issued credentials (i.e., user.company.com@account.ibc.ca). If you are using the credentials issued by your company, you will not be able to use this function. Please contact your User Administrator.

1. Open your browser and navigate to https://dash.ibc.ca.
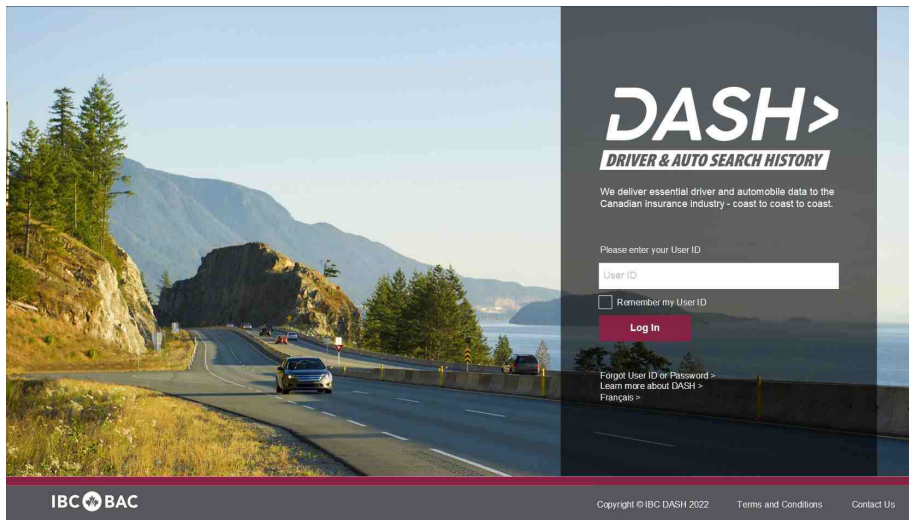
2. Click on the **Forgot User ID or Password** link.

> **Forgot Your User ID or Password?**
>
> Please enter the email address associated with your account and click **Submit**.
> DASH will send you a system-generated email with further instructions.
>
> Email address
>
> **Submit**

3. Enter your *email address* and click on the **Submit** button.
4. You will receive the following email:

> Hello,
>
> Your DASH User ID is: **user.company.ca@account.ibc.ca**
> To complete your password reset please follow this link: DASH Portal
> This link will expire in 60 minutes and can be used only once.
>
> **Please do not reply to this message.**
> For any questions, please contact us at DASHSupport@ibc.ca
>
> Regards,
> DASH Team

5. Click on the DASH Portal link to navigate to the Verification Code page.

Verification Code

To verify your identity, we will send a verification code to the phone number linked to your account.
Simply click the **Send Code** button to request the code. It may take a few minutes for the code to arrive.

[Send Code]

Once you have received the verification code, please enter it into the box below and click **Next**.

[   ]

[Next]

6. Click on the **Send Code** button to request the verification code.
7. The verification code is sent to the phone number associated with your account. The code may take a few minutes to arrive.
8. Enter the verification code and click on the **Next** button to navigate to the Password page.

Password

Please enter a new DASH password below and click **Next**:

New password   👁
Confirm new password   👁

[Next]

The password must contain at least 3 of the following 4 character types:

- Uppercase letters
- Lowercase letters
- Numerals
- Special characters {[(@-#_$+%=^,&*'\`|:?'/~;!)]}

The password must contain between 8 and 64 characters.

9. Set your password for DASH by entering and confirming the *New Password*, and clicking on the **Next** button.
10. Confirmation page is displayed.

Confirmation

Your DASH password has been saved.
Click **Finish** to return to the DASH login page.

[Finish]

11. Click on the **Finish** button to return to the DASH login page.
12. Follow the steps outlined in the first part of this section.

TROUBLESHOOTING

- **The link in the email does not work:** The link expires in 60 minutes and can be used only once. Please contact your User Administrator.
- **I did not receive the verification code:** The verification code is sent to the phone number associated with your user account. Please contact your User Administrator and confirm that the phone number is correct.

1-3 Language

The DASH Portal is available in English and French.

When you first access https://dash.ibc.ca, the page will be displayed in the language that matches the regional settings in your browser.

You can change the language at any time by using the language link in the header of the DASH Portal:

1. If the page is presented in English, click on the **Français** link to change the language to French.
2. If the page is presented in French, click on the **English** link to change the language to English.

NOTE
The DASH Portal will remember your language selection. The next time you access the DASH Portal, it will be presented in the language you selected on your previous visit.

The Portal

1-4 Navigation

Once you are logged in (see Section 1-1 Logging In), the DASH Portal will provide several ways of navigating through its functions.

Landing Page Tiles

The first page after you log in is the landing page, which displays all of the functions that are available to you as tiles:

NOTE
The above image is for illustration purposes only. Your landing page may appear differently, depending on the DASH functions assigned to you. The DASH Portal will only display functions that are assigned to you by your User Administrator.

You can click on a specific tile to navigate to the desired DASH function.

Hamburger Menu

After logging in, the hamburger menu ☰ is available in the header of the DASH Portal

1. Click on the hamburger menu ☰ button.
2. From the displayed menu, select the desired function.

NOTE
The above image is for illustration purposes only. Your menu may appear differently, depending on the DASH functions assigned to you. The DASH Portal will only display functions that your User Administrator has assigned to you.

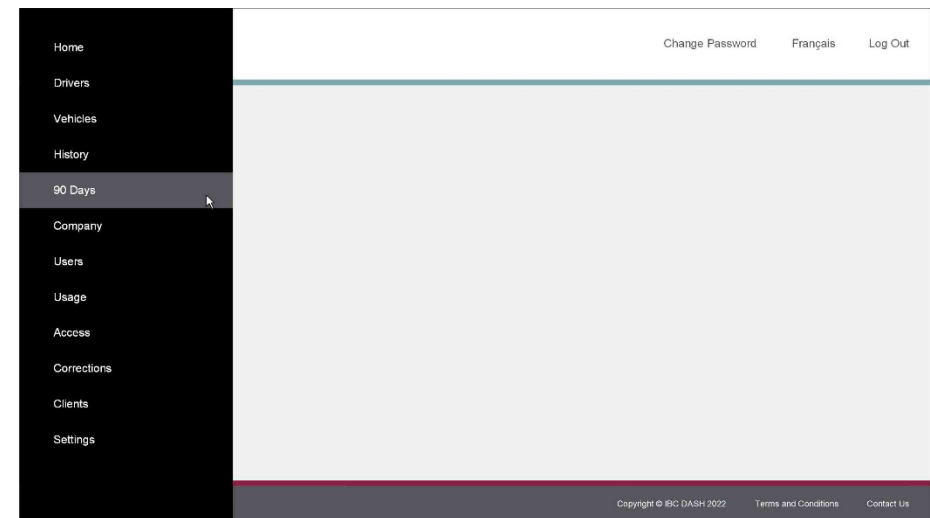# 1-5 Changing Your Password

If you are using the credentials issued by IBC, you will have access to the self-serve Change Password functionality. Follow the steps below to change your password.

> **IMPORTANT**
> The following steps apply only to users with IBC-issued credentials (i.e., user.company.com@account.ibc.ca). If you are using credentials issued by your company, please contact your User Administrator.

1. Log in to the DASH Portal.
2. After logging in, the Change Password link is available in the header of the DASH Portal:

3. Click on the **Change Password** link.
4. Change Password screen is presented.

5. Enter the *Current Password.*
6. Enter the *New Password*.
7. Enter the new password again in the *Confirm Password* field.
8. Click on the **Save** button.
9. After completing the steps above, your password will be changed.

> **IMPORTANT**
> It is required that you use a strong password.
> The password must contain at least 3 out of the following 4 character types:
> - Uppercase letters
> - Lowercase letters
> - Numbers
> - Special characters {[(@-#_$+%=^,&*\`|:?'/~;!)]}
>
> The password must contain between 8 and 64 characters.

1-6 Cookies

The DASH Portal uses cookies to optimize the user experience and support its functionalities.

The cookie notification is displayed at the bottom of the screen when you first visit the DASH Portal:

This website uses cookies to optimize the user experience.   **OK**

1. Click on the **OK** button to dismiss the cookie notification.

NOTE
Once you dismiss the cookie notification, it will not be displayed again unless you clear your browser cache, or you access the DASH Portal through a private (incognito) window.

1-7 Information Pages

The DASH Portal includes links to several DASH information pages:
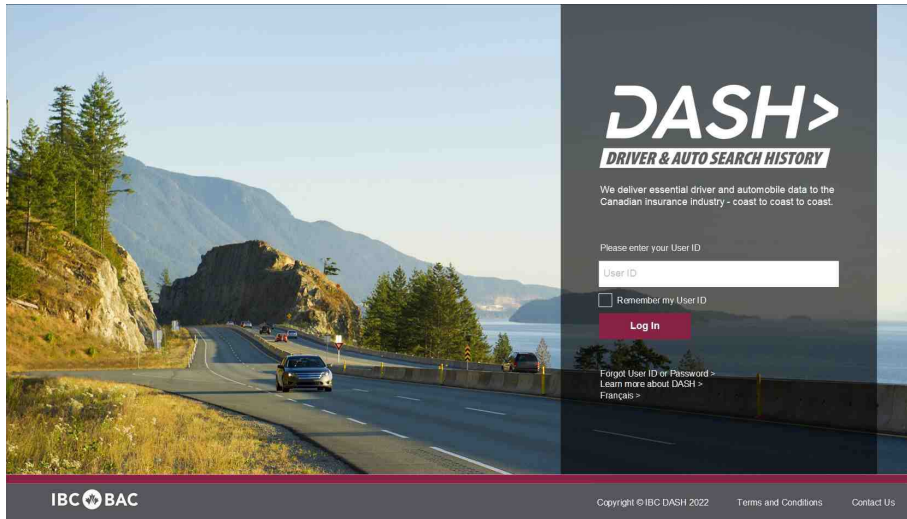
1. Click on the **Learn more about DASH** link on the login page to navigate to DASH Info website.
2. Click on the Terms and Conditions link in the footer to review the DASH terms and conditions.
3. Click on the Contact Us link in the footer to review the DASH contact information.

NOTE
IBC reserves the right to update the information pages when needed.

1-8 Logging Out

After finishing your work in the DASH Portal, it is recommended that you log out.

You can log out at any time by clicking on the **Log Out** link in the header of the DASH Portal:

> **IMPORTANT**
> You will be automatically logged out from the DASH Portal after 30 minutes of inactivity.

> **NOTE**
> Closing the browser window/tab will log you out from the DASH Portal.

2 Drivers

The Drivers function allows you to search and review the insurance history of a specific driver.

The search can be performed based on the driver's license number or a set of advanced search fields. The driver report contains detailed information about the driver's insurance policies and claims history.

The report can be reviewed online, or exported and printed in PDF format.

The Drivers function also allows authorized users to perform corrections to the driver's data.

2-1 Searching for a Driver

The driver report provides detailed information on a driver's insurance history, including the history of their insurance policies and claims.

To obtain the report for a specific driver, you need to identify the driver with some key information, such as the driver's license number (DLN).

Follow these steps to find a specific driver and obtain their driver report:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Drivers** option.

> NOTE
> Alternatively, you can use the landing page tiles to navigate to Drivers function (see Section 1-4 Navigation).

3. Drivers search screen is presented:

Driver's License Number	
Driver's License Province	All Provinces
Number of Years of Data	25 Years

By clicking **Search** I represent and warrant that I have obtained the required consent to:
i) provide the above personal information and
ii) access the requested number of years of data for the purpose of underwriting insurance risk.

Comment	

Search   **Reset**   Show advanced search fields

4. Enter the *Driver's License Number*.

> NOTE
> The DASH Portal will ignore all special characters and blank spaces in the entered DLN and find the match based solely on the alphanumeric characters. For example, searching for A1234-12345-12345, and searching for A12341234512345 will return the same result.

> NOTE
> If the DLN is not available, you can use the advanced search option (see Section 2-2 Using Advanced Search).

5. Select the *Driver's License Province*.

> NOTE
> By default, the province is populated with the value that you selected on your previous search, but you can change the selection at any time.

6. Select the *Number of Years of Data* to be included in the driver report.

> NOTE
> Your company sets the options in the number-of-years drop-down menu. If you require different options from what is available in the drop-down menu, please contact you User Administrator.

> NOTE
> You should select the value that reflects your business need and for which you have obtained the consent from the driver.
> The DASH Portal will provide the requested number of years of data in the driver report, subject to data availability.

7. Enter the *Comment* (optional).

> **NOTE**
> A comment can be added to each driver report search. You will later be able to find this specific driver report based on the comment (see Section 3 History).
> You may choose to enter a policy ID, a case number or a similar identification as your comment. You may also choose to leave the comment empty, as it is an optional field.

> **IMPORTANT**
> By clicking Search button you represent and warrant that you have obtained the required consent to:
> i) provide the above personal information and
> ii) access the requested number of years of data for the purpose of underwriting insurance risk.

8. Click on the   **Search**   button to request the driver report.

> **NOTE**
> You can click on the   **Reset**   button to clear all of the fields in the search criteria.

9. You will be presented with the following dialogue to confirm that you are requesting the report for the correct driver:

John A. Smith

DLN: **S1234-15678-19123**

Date of Birth: **1980-09**

Cancel   **Get Report**

---

10. Click on the   **Get Report**   button to obtain the driver report.

> **NOTE**
> You can click on the   **Cancel**   button to return to the search screen without retrieving the driver report.

11. The DASH Portal will display the requested driver report on the screen.

> **IMPORTANT**
> Your search criteria must be specific enough to match just one driver.

> **IMPORTANT**
> The DASH Portal identifies drivers based on their driver's license number and the province where their license was issued. If a driver is linked to 2 different driver's license numbers (e.g., due to a name change or moving to another province), DASH will identify them as 2 separate drivers.

Drivers

TROUBLESHOOTING

- **Drivers function is not available in the menu:** Please contact your User Administrator.
- **The search returned zero results:** Please check that the entered DLN and province are correct. Or, use the advanced search to find the correct driver.
- **The search returned multiple results:** Please check that the entered DLN and province are correct and not blank. Or, use the advanced search to find the correct driver.
- **DLN not available or incorrect:** Please use the advanced search to find the correct driver.
- **DLN is issued outside of Canada:** The DASH Portal can only provide information on Canadian drivers. If the driver has a history of insurance in Canada, please use the advanced search to find the correct driver.
- **The available number-of-years options do not match your business needs:** Please contact your User Administrator.
- **Default number-of-years option is incorrect:** Please contact your User Administrator.
- **Not sure what to enter in the comment field:** The comment field is optional and you can leave it blank.

2-2 Using Advanced Search

The driver report provides detailed information on a driver's insurance history, including the history of their insurance policies and claims.

To obtain the report for a specific driver, you will need to identify the driver using key information, such as the driver's license number (DLN). If the DLN is not available, or if it is not returning the expected result, you can use the advanced search option, and identify the correct driver based on several additional data elements.

Follow these steps to find the specific driver through the advanced search:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Drivers** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Driver Report (see Section 1-4 Navigation).

3. The Drivers search screen is presented:

Driver's License Number	
Driver's License Province	All Provinces
Number of Years of Data	25 Years

By clicking **Search** I represent and warrant that I have obtained the required consent to:
i) provide the above personal information and
ii) access the requested number of years of data for the purpose of underwriting insurance risk.

Comment

Search   **Reset**   Show advanced search fields

4. Click on the Show advanced search fields link to show the advanced search fields:

Driver's License Number	
Driver's License Province	All Provinces
Driver's Name	
Address	
Year of Birth	YYYY
VIN	
Policy #	
Claim #	
Number of Years of Data	25 Years

By clicking **Search** I represent and warrant that I have obtained the required consent to:
i) provide the above personal information and
ii) access the requested number of years of data for the purpose of underwriting insurance risk.

Comment

Search   **Reset**   Hide advanced search fields

> **NOTE**
> You can hide the advanced search fields at any time by clicking on the Hide advanced search fields link.

5. Enter a combination of the advanced search fields:
   - *Driver's Name* (partial entry is allowed)
   - Driver's *Address* (partial entry is allowed)
   - Driver's *Year of Birth*
   - *VIN* (vehicle identification number) of any of the vehicles insured on any of the driver's policies in the past
   - Identification of a *Policy* on which the driver was insured in the past

Drivers

- Identification of a *Claim* on which the driver was listed as the first party in the past

NOTE
The DASH Portal allows partial entry on several advanced search fields (as noted). This means that the result will be identified even if it is not an exact match but contains the value entered in the search field. For example, searching for value "123 Main" would match the address "123 Main Street".

IMPORTANT
Your search criteria must be specific enough to match just one driver, otherwise you will get the message "Multiple Results Found".
At least one of the following fields must be populated in order to identify the driver: Driver's License Number, VIN, Policy #, Claim #.

6. Select the *Number of Years of Data* to be included in the driver report.

NOTE
Your company sets the options in the number-of-years drop-down menu. If you require different options from what is available in the drop-down menu, please contact your User Administrator.

NOTE
You should select the value that reflects your business need and for which you have obtained consent.
The DASH Portal will provide the requested number of years of data in the driver report, subject to data availability.

7. Enter the *Comment* (optional).

NOTE
A comment can be added to each driver report search. You will later be able to find this specific driver report based on the comment (see Section 3 History).
You may choose to enter a policy ID, a case number or a similar identification as your comment. You may also choose to leave the comment empty, as it is an optional field.

IMPORTANT
By clicking Search button you represent and warrant that you have obtained the required consent to:
i) provide the above personal information and
ii) access the requested number of years of data for the purpose of underwriting insurance risk.

8. Click on the **Search** button to request the driver report.
9. You will be presented with the following dialogue to confirm that you are requesting the report for the correct driver.

John A. Smith

DLN: **S1234-15678-19123**

Date of Birth: **09-1980**

Cancel   Get Report

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

Drivers

10. Click on the **Get Report** button to obtain the driver report.

> **NOTE**
> You can click on the **Cancel** button to return to the search screen without retrieving the driver report.

11. The DASH Portal will display the requested driver report on the screen.

> **IMPORTANT**
> The DASH Portal identifies drivers based on their driver's license number and the province in which the license was issued. If a driver is linked to 2 different driver's license numbers (e.g., due to a name change or moving to another province), DASH will identify them as 2 separate drivers.

TROUBLESHOOTING

- **The Drivers function is not available in the menu:** Please contact your User Administrator.
- **The search returned zero results:** Please modify your search criteria – consider removing some of the search field values to relax the search criteria.
- **The search returned multiple results:** Please modify your search criteria – consider adding more search field values to restrict the search criteria. Please note that at least one of the following fields must be populated in order to identify the driver: Driver's License Number, VIN, Policy #, Claim #.
- **The available number-of-years options do not match your business needs:** Please contact your User Administrator.
- **The default number-of-years option is incorrect:** Please contact your User Administrator.
- **Not sure what to enter in the comment field:** The comment field is optional, and you can leave it blank.

2-3 Viewing a Driver Report

After you perform a successful search for a specific driver (see Section 2-1 Searching for a Driver and 2-2 Using Advanced Search), the DASH Portal will display the driver report:

1. Some of the fields in the report have the icon ⓘ displayed. You can place your mouse on the icon to see more information about that specific field.
2. All policies in the driver report are initially displayed in collapsed form (only the header row is displayed for each policy) to provide you with a quick high-level view. You can expand or collapse the policies at any time:
    - Click on the **Policies ▶▶** icon to expand or collapse all policies in the report.
    - Click on the ▶ icon in an individual policy header to expand or collapse the individual policy.
3. All claims in the driver report are initially displayed in collapsed form (only the header row is displayed for each claim) to provide you with the quick high-level view. You can expand or collapse the claims at any time:
    - Click on the **Claims ▶▶** icon to expand or collapse all claims in the report.
    - Click on the ▶ icon in an individual claim header to expand or collapse the individual claim.
4. Click on the **Back** button to go back to the Drivers search page.
5. Click on the **Open PDF** button to open the driver report as a PDF document.

NOTE
The PDF document will open in a separate browser tab or window. You may need to allow pop-ups from the DASH Portal in your browser to view the PDF document.

Drivers

Policies ⤓

Note: Information related to commercial policies may be incomplete.

▼ 2020-03-31 to 2022-03-31   ABC Insurance Company   *OVERLAP*   Active

Policy #: **CIC-012345 / Canadian Insurance Company**	Effective Date: **2017-03-31**
Policyholder Name: **John A. Smith**	Expiry Date: **2022-03-31**
Policyholder Address: **45 First Street, Smalltown, ON, B7B 7B7**	Cancellation Date: **N/A**
Number of Reported Operators: **1**	
Number of Private Passenger Vehicles: **1**	

Operator: **John A. Smith**	Vehicle #1: **Principal Operator**
DLN: **S1234-15678-19123 Ontario**	Start of the Earliest Term: **2020-03-31**
Relationship to Policyholder: **Self**	End of the Latest Term: **2022-03-31**
Years Licensed: **12**	
Year of Birth: **1980**	

Vehicle #1: **2015 Ford Focus - 1FL81H7TM02038457**	Coverage: **AB; CL; CM;**
Vehicle Code: **234500**	Commuting Distance One-Way / Annual: **25 / 16000**
Vehicle Location: **B7B**	Business Use: **0%**
Vehicle Use: **Pleasure**	Branding: **None**
Vehicle Class: **01 / Private Passenger Vehicle**	Gross Vehicle Weight: **1750kg**
Driving Record: **7**	

                     POSSIBLE GAP

▶ 2009-03-31 to 2017-01-01   XYZ Insurance Company   *COMMERCIAL*   Active – driver deleted

Claims ⤓

▼ Date of Loss: 2020-05-25   ABC Insurance Company   At-fault: 0%

Policyholder Name: **John A. Smith**	Coverage: **AB; CL;**
Policyholder Address: **45 First Street, Smalltown, ON, B7B 7B7**	Date Reported: **2021-05-31**
Policy #: **ABC-12345 / ABC Insurance Company**	Claim Status: **Open**
Claim #: **CX-54321**	

Total Loss: **$5,540.00**
Total Expense: **$220.00**

KOL20 – Collision: **$2,500.00 (loss); $220.00 (expense);**
KOL86 – Examinations: **$0.00 (loss); $0.00 (expense);**
KOL41 – Medical: **$3,040.00 (loss); $0.00 (expense); RESERVE (23/06);**

Vehicle: **2015 Ford Focus – 1FL81H7TM02038457**
Vehicle Class: **01 / Private Passenger Vehicle**
Vehicle Loss: **Partial**

First Party Driver: **John A. Smith**
First Party Driver DLN: **S1234-15678-19123 Ontario**
First Party Driver Date of Birth: **1980-01-31**
First Party Driver Listed on Policy: **Yes**
First Party Driver Excluded: **No**
First Party Driver At-Fault: **100%**

Third Party Driver: *****
Third Party Driver DLN: *****
Third Party Driver Insurer Name: **Top Insurance Co.**
Third Party Driver Policy #: **TIC-0129388**
Third Party Driver At-Fault: **0%**

▶ Date of Loss: 2014-10-05   ABC Insurance Company   *RESERVE ONLY*   At-fault: 50%

▶ Date of Loss: 2014-10-05   XYZ Insurance Company   *THIRD PARTY*   At-fault: 100%

NOTE
The image to the left is for illustration purposes only. It depicts one of the policies in the expanded form and one of the claims in the expanded form. The values displayed in the sample do not represent real data.

2-4 The Contents of a Driver Report

The driver report provides detailed information on a driver's insurance history, including the history of their insurance policies and claims.

> **NOTE**
> The term **the driver** refers to the specific driver that was selected through the search (see Section 2-1 Searching for a Driver and 2-2 Using Advanced Search).

The content of the report includes the following sections:

- Summary section
- Policies section
- Claims section
- Previous inquiries section.

Summary Section

John A. Smith DLN: **S1234-15678-19123 Ontario** Date of Birth: **1980-01-31**	Report Date: **2021-08-22 09:32:03** Requestor: **Jack Jackson** Company: **ABC Insurance** Comment: **ABC-12345** Last Data Update: **2021-08-02** Number of Years of Data: **25**
Address: **45 First Street, Smalltown, ON, B7B 7B7** Number of Policies at this Address ⓘ: **1** Gender: **Male** Marital Status: **Married** Years Licensed: **12** Years of Continuous Insurance ⓘ: **12** Years Claims Free ⓘ: **0** Driver Training: **No**	Number of Claims in Last 6 Years ⓘ: **4** Number of At-Fault Claims in Last 6 Years ⓘ: **3** Number of Comprehensive Losses in Last 6 Years ⓘ: **0** Number of DCPD Claims in Last 6 Years ⓘ: **1** Alberta Operator Grid Level: **N/A** Alberta Operator Grid Indicator: **N/A** Alberta Grid Rating Date: **N/A**

Name – the name of the driver. It includes the first name, the middle name or initial (if available), and the last name.

DLN – the driver's license number. It also includes the province where the driver's license was issued.

Date of Birth – the date of birth of the driver in format YYYY-MM-DD. In some cases, only the year of birth will be available.

Report Date – the date and time when the report was generated.

Requestor – the first and last name of the person who requested the report. If a broker requested the report, the brokerage name is also displayed.

Company – the company for which the report was requested. The company is determined based on the value selected in the number-of-years drop-down menu on the search screen.

Comment – the comment that was entered on the search screen. If the comment was not entered, this field will show "Not Available".

Last Data Update – the date when the most recent data presented in the report was received at IBC.

Number of Years of Data – the number of years of data included in the report. The value is determined based on the value selected in the number-of-years drop-down menu on the search screen.

Address – the address of the driver, including the street address, city, province and postal code.

Number of Policies at this Address – the total number of active policies that are reported at this address at the time the report was generated.

Gender – the gender of the driver.

Marital Status – the marital status of the driver.

Drivers

Years Licensed – the number of years the driver has been licensed, as reported by the driver's insurer.

Years of Continuous Insurance – the number of full years that the driver had continuous insurance (with no gaps) up to the report date. The number is based on available records.

Years Claims Free – the number of full years since the last claim in which the driver's at-fault percentage was greater than 0%.

Driver Training – the indicator showing if the driver completed driver training, as reported by the driver's insurer.

> **NOTE**
> Claims that have no paid amounts, but only outstanding (reserve) amounts, are not included in the totals below.

Number of Claims in Last 6 Years – the total number of claims where the date of loss (accident date) falls within 6 years prior to the report date. The number is based on the claims displayed in the Claims Section.

Number of At-Fault Accidents in Last 6 Years – the total number of claims in which the driver's at-fault percentage was greater than 0% and in which the accident date falls within 6 years prior to the report date. The number is based on the claims displayed in the Claims Section.

Number of Comprehensive Losses in Last 6 Years – the total number of comprehensive claims in which the date of loss falls within 6 years prior to the report date. The number is based on the claims displayed in the Claims Section.

Number of DCPD Claims in Last 6 Years – the total number of DCPD (direct compensation for property damage) claims in which the date of loss (accident date) falls within 6 years prior to the report date. The number is based on the claims displayed in the Claims Section.

> **NOTE**
> The following fields (Alberta Operator Grid Level, Alberta Operator Grid Indicator and Alberta Grid Rating Date) are displayed only for drivers whose latest policy was issued in Alberta.
> For all other drivers these three fields are not displayed.

Alberta Operator Grid Level – the Alberta operator grid level for the driver.

Alberta Operator Grid Indicator – the Alberta operator grid indicator for the driver.

Alberta Grid Rating Date – the date when the displayed Grid Level was assigned.

Policies Section

This section shows all policies in which the driver was listed in the past number of years that you requested during the search. If there were any overlapping policies or potential gaps in coverage, this information is also included.

> **NOTE**
> Each line in the list represents one uninterrupted coverage period under one policy. One line can cover multiple years, if the driver was insured under the same policy for multiple terms.

All policies in the driver report are initially displayed in collapsed form (only the header row is displayed for each policy) to provide you with a quick high-level view. You can expand or collapse the policies at any time using the "▶" or "▼" icon.

Policies ⏩			
Note: Information related to commercial policies may be incomplete.			
▶ 2020-03-31 to 2022-03-31	ABC Insurance Company	*OVERLAP*	Active
▶ 2017-04-30 to 2020-04-30	XYZ Insurance Company	*OVERLAP* *COMMERCIAL*	Cancelled – insured's request
		POSIBLE GAP	
▶ 2009-03-31 to 2017-01-01	XYZ Insurance Company	*COMMERCIAL*	Active – driver deleted

> **NOTE**
> The above image is for illustration purposes only – it depicts policies in the collapsed form. The values displayed in the sample do not represent real data.

Note – The available data for commercial policies is limited. If the driver was covered under a commercial policy, it may not be displayed in the driver report.

Start Date – The start of the coverage period shows the beginning of the earliest term in an uninterrupted policy coverage.

End Date – The end of the coverage period shows the end of the latest term in an uninterrupted policy coverage.

Insurance Company – the name of the insurance company that issued the policy.

Overlap – the indicator showing that the driver was listed on more than one policy at the same time

Possible Gap – the indicator showing that according to the available data there may be a gap in the coverage of the driver

Commercial – the indicator showing that the policy is deemed commercial

Policy Status – the status of the policy as of the report date. The possible statuses are:

- **Active** – the policy is in effect and the driver is listed on the policy as of the report date.
- **Active – driver deleted** – the policy is in effect but the driver is deleted from the policy as of the report date.
- **Expired** – the policy is expired as of the report date.
- **Cancelled – non-payment** – the policy is cancelled for nonpayment as of the report date.
- **Cancelled – renewal not taken** – the policy is cancelled due to renewal not taken as of the report date.
- **Cancelled – underwriting** – the policy is cancelled based on underwriting as of the report date.
- **Cancelled – material misrepresentation** – the policy is cancelled for material misrepresentation as of the report date.
- **Cancelled – insured's request** – the policy is cancelled at insured's request as of the report date.

- **Cancelled – other reason** – the policy is cancelled for any other reason not listed above as of the report date.

▼ 2020-03-31 to 2022-03-31	ABC Insurance Company	*OVERLAP*	Active

Policy #: **CIC-012345 / Canadian Insurance Company**   Effective Date: **2017-03-31**
Policyholder Name: **John A. Smith**   Expiry Date: **2022-03-31**
Policyholder Address: **45 First Street, Smalltown, ON, B7B 7B7**   Cancellation Date: **N/A**
Number of Reported Operators: **1**
Number of Private Passenger Vehicles: **1**

Operator: **John A. Smith**   Vehicle #1: **Principal Operator**
DLN: **S1234-15678-19123 Ontario**   Start of the Earliest Term: **2020-03-31**
Relationship to Policyholder: **Self**   End of the Latest Term: **2022-03-31**
Years Licensed: **12**
Year of Birth: **1980**

Vehicle #1: **2015 Ford Focus - 1FL81H7TM02038457**   Coverage: **AB; CL; CM;**
Vehicle Code: **234500**   Commuting Distance One-Way / Annual: **25 / 16000**
Vehicle Location: **B7B**   Business Use: **0%**
Vehicle Use: **Pleasure**   Branding: **None**
Vehicle Class: **01 / Private Passenger Vehicle**   Gross Vehicle Weight: **1750kg**
Driving Record: **7**

> **NOTE**
> The above image is for illustration purposes only – it depicts one of the policies in the expanded form. The values displayed in the sample do not represent real data.

Policy # – the policy number and the name of the insurance company that issued the policy.

Policyholder Name – the name of the policyholder. It includes the first name, the middle name or initial (if available), and the last name.

Policyholder Address – the address of the policyholder, including the street address, city, province and postal code.

Number of Reported Operators – the total number of operators reported through the Automobile Statistical Plan (ASP), or supplementary data as of the report date.

Number of Private Passenger Vehicles – the total number of private passenger vehicles listed on the policy as of the report date.

Effective Date – the effective date of the policy. If the policy was in effect for multiple terms, this shows the effective date of the first policy term.

> **NOTE**
> The start date of the driver's coverage and the effective date of the policy will match if the driver was covered under the policy since the beginning of the first policy term. However, if the driver was added to the policy after it was already in effect, then the start date of the driver's coverage and the effective date of the policy will not match.

Expiry Date – the expiry date of the latest policy term. If the policy is still in effect as of the report date, the expiry date will be in the future.

Cancellation Date – the cancellation date of the policy. If the policy has not been cancelled, then this field shows N/A.

> **NOTE**
> The list of policy operators includes the operators listed on the policy during the time when the driver was covered under the policy. It is possible that there were operators listed on the policy whose coverage did not overlap with the driver's coverage under the same policy; such operators are not displayed.

Operator – the name of the operator. It includes the first name, the middle name or initial (if available), and the last name. This represents the latest information reported by the industry for the driver with the specified DLN.

DLN – the operator's license number. It also includes the province where the driver's license was issued.

Relationship to Policyholder – the operator's relationship to the policyholder.

Years Licensed – the number of years that the operator has been licensed, as reported by the driver's insurer.

Drivers

Year of Birth – the operator's year of birth. This represents the latest information reported by the industry for the driver with the specified DLN.

Vehicle Operator – the indicator showing if the operator is a principal operator (drives the vehicle most of the time), an additional operator or excluded driver (excluded from driving the vehicle).

Start of the Earliest Term – the effective date of the earliest policy term on which the operator was listed.

End of the Latest Term – the expiry or cancellation date (whichever is earlier) of the latest policy term on which the operator was listed.

> **NOTE**
> The list of policy vehicles includes the vehicles listed on the policy during the time when the driver was covered under the policy. It is possible that there were vehicles listed on the policy for which the coverage did not overlap with the driver's coverage under the same policy; such vehicles are not displayed.

Vehicle – the model year, make, model and vehicle identification number (VIN) of the vehicle. In some cases, the make and model may display multiple values if the unique values cannot be determined.

Vehicle Code – the vehicle code of the vehicle. This field is displayed only for vehicles on active policies.

Vehicle Location – the first three characters of the postal code where the vehicle is primarily used. This field is displayed only for vehicles on active policies.

Vehicle Use – the vehicle use as reported by the insurer.

Vehicle Class – the type of use code, as defined in the Automobile Statistical Plan (ASP) and the corresponding vehicle class.

Driving Record – the number of years of experience without claims for the principal operator of the vehicle. This field is displayed only for vehicles on active policies.

Coverage – the list of coverages for the vehicle under the policy. The coverages are displayed as abbreviations: **TP** – third-party liability; **TP-BI** – third-party liability for bodily injury; **TP-PD** – third-party liability for property damage; **DCPD** – direct compensation for property damage; **UA** – uninsured automobile; **UM** – underinsured motorist; **AB** – accident benefits; **CL** – collision/all perils; **CM** – comprehensive/specified perils.

Commuting Distance One-Way/Annual – the commuting distance for the vehicle (one way and annual), shown in kilometers.

Business Use – the percentage of the business use for the vehicle.

Branding – the branding status of the vehicle. This field is displayed only for vehicles on active policies.

Gross Vehicle Weight – the gross vehicle weight in kilograms. This field is displayed only for vehicles on active policies.

Claims Section

This section includes the following claims:

- All claims where the driver was the first party in the claim
- All claims where the driver was the third party in the claim
- All other claims, where the driver is neither the first party nor the third party, submitted under the non-commercial policy(s) on which the driver was listed as of the accident date

> **NOTE**
> The claims are sorted with the newest claims on the top and the oldest claims at the bottom.

All claims in the driver report are initially displayed in collapsed form (only the header row is displayed for each claim), to provide you with the quick high-level view. You can expand or collapse the claims at any time using the "▶" or "▼" icons.

Claims ▶▶			
▶ Date of Loss: 2020-05-25	ABC Insurance Company		At-fault: 100%
▶ Date of Loss: 2014-10-05	ABC Insurance Company	*RESERVE ONLY*	At-fault: 50%
▶ Date of Loss: 2014-10-05	XYZ Insurance Company	*THIRD PARTY*	At-fault: 100%

> **NOTE**
> The above image is for illustration purposes only – it depicts claims in the collapsed form. The values displayed in the sample do not represent real data.

Date of Loss – the date of loss (or the accident date) for the claim

Insurance Company – the name of the insurance company that issued the policy under which the claim was submitted.

Reserve Only – the indicator showing that the claim has no paid amounts, but only outstanding (reserve) amounts.

Third Party – the indicator showing that the driver was listed as the third party on the claim

At-Fault – the driver's at-fault percentage for the claim.

▼ Date of Loss: 2020-05-25	ABC Insurance Company	At-fault: 0%
Policyholder Name: **John A. Smith** Policyholder Address: **45 First Street, Smalltown, ON, B7B 7B7** Policy #: **ABC-12345 / ABC Insurance Company** Claim #: **CX-54321**	Coverage: **AB; CL;** Date Reported: **2021-05-31** Claim Status: **Open**	
Total Loss: **$5,540.00** Total Expense: **$220.00**		
KOL20 – Collision: **$2,500.00 (loss); $220.00 (expense);** KOL86 – Examinations: **$0.00 (loss); $0.00 (expense);** KOL41 – Medical: **$3,040.00 (loss); $0.00 (expense); RESERVE (23/06);**		
Vehicle: **2015 Ford Focus – 1FL81H7TM02038457** Vehicle Class: **01 / Private Passenger Vehicle** Vehicle Loss: **Partial**		
First Party Driver: **John A. Smith** First Party Driver DLN: **S1234-15678-19123 Ontario** First Party Driver Date of Birth: **1980-01-31** First Party Driver Listed on Policy: **Yes** First Party Driver Excluded: **No** First Party Driver At-Fault: **100%**		
Third Party Driver: ***** Third Party Driver DLN: ***** Third Party Driver Insurer Name: **Top Insurance Co.** Third Party Driver Policy #: **TIC-0129388** Third Party Driver At-Fault: **0%**		

> **NOTE**
> The above image is for illustration purposes only – it depicts one of the claims in the expanded form. The values displayed in the sample do not represent real data.

Policyholder Name – the name of the policyholder. It includes the first name, the middle name or initial (if available), and the last name.

Policyholder Address – the address of the policyholder, including the street address, city, province and postal code.

Policy # – the policy number and the name of the insurance company that issued the policy under which the claim was submitted.

Claim # – the claim number.

Claim Status – the status of the claim (open or closed).

NOTE
The claim status is based on the outstanding amounts (reserves). Claims with no outstanding amounts are considered closed.

Coverage – the list of coverages associated with the claim. The coverages are displayed as abbreviations: **TP** – third-party liability; **TP-BI** – third-party liability for bodily injury; **TP-PD** – third-party liability for property damage; **DCPD** – direct compensation for property damage; **UA** – uninsured automobile; **UM** – underinsured motorist; **AB** – accident benefits; **CL** – collision/all perils; **CM** – comprehensive/specified perils.

Date Reported – the date when the claim was entered into the insurer's system.

Total Loss – the total amount of paid loss accumulated on the claim as of the report date.

Total Expense – the total amount of paid expense accumulated on the claim as of the report date.

KOL List – the list shows one line per kind of loss reported for the claim. Each line includes the kind of loss code and description as well as the total amount of paid loss and paid expense accumulated on the claim for that kind of loss as of the report date. If a reserve amount (loss or expense) was reported for

a KOL, then the RESERVE flag is displayed next to that KOL, with the date (YY/MM) when the reserve was reported.

Vehicle – the model year, make, model and vehicle identification number (VIN) of the vehicle involved in the claim. In some cases, the make and model may display multiple values if the unique values cannot be determined.

Vehicle Class – the type of use code, as defined in the Automobile Statistical Plan (ASP) and the corresponding vehicle class.

Vehicle Loss – the indicator showing if the vehicle suffered a total or a partial loss.

First-Party Driver – the name of the first-party driver. It includes the first name, the middle name or initial (if available), and the last name. This represents the latest information reported by the industry for the driver with the specified DLN.

First-Party Driver DLN – the first-party driver's license number. It also includes the province where the driver's license was issued.

First-Party Driver Date of Birth – the date of birth of the first-party driver in format YYYY-MM-DD. In some cases, only the year of birth will be available. This represents the latest information reported by the industry for the driver with the specified DLN.

First-Party Driver Listed on Policy – the indicator showing if the first-party driver is listed on the policy or not.

First-Party Driver Excluded – the indicator showing if the first-party driver is an excluded driver or not.

First-Party Driver At-Fault – the first-party driver's at-fault percentage for the claim.

Drivers

Third-Party Driver – the name of the third-party driver. It includes the first name, the middle name or initial (if available), and the last name. This represents the latest information reported by the industry for the driver with the specified DLN.

Third-Party Driver DLN – the third-party driver's license number. It also includes the province where the driver's license was issued.

Third-Party Driver Insurer Name – the name of the third-party driver's insurer.

Third-Party Driver Policy # – the policy number under which the third-party driver was insured at the time of the loss.

Third-Party Driver At-Fault – the third-party driver's at-fault percentage for the claim.

NOTE
For privacy reasons some of the data fields in the report may be masked ("*****" is displayed). This applies to the private information on claim parties other than the driver who is the subject of the report.

Previous Inquiries Section

This section displays the list of the previous inquiries made through DASH on the same driver in the past 12 months.

NOTE
This section includes the inquiries made through the DASH Portal and the inquiries made through DASH application programming interface (API). For more information on DASH API, please refer to the DASH technical documentation.

Previous Inquiries
2020-03-31 ABC Insurance Company
2020-03-31 Canadian Insurance Company

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

Inquiry Date – the date when a driver report was generated for the same driver.

Inquiring Company – the name of the company that requested the driver report.

NOTE
If there were no previous inquiries on the same driver in the past 12 months, the list will show "None."

2-5 Saving a Driver Report

The DASH Portal allows you to save driver reports in PDF format. To begin, follow the steps in Section 2-3 Viewing the Driver Report to display the driver report:

NOTE
The image to the left is for illustration purposes only. The values displayed in the sample do not represent real data.

1. Click on the **Open PDF** button to open the driver report as a PDF document.

IMPORTANT
The PDF document will open in a separate browser tab or window. You may need to allow pop-ups from the DASH Portal in your browser to view the PDF document.

NOTE
The PDF document will always display all policies and claims in the expanded form. Please note that the first page of the PDF document shows the summary section of the driver report, and the subsequent pages show policies, claims and previous inquiries.

2. Use your browser controls to save the PDF document.

IMPORTANT
The DASH Portal automatically saves each generated driver report in the History archive.

2-6 Printing a Driver Report

The DASH Portal allows you to print driver reports in PDF format. To begin, follow the steps in Section 2-3 Viewing the Driver Report to display the driver report:

NOTE
The image to the left is for illustration purposes only. The values displayed in the sample do not represent real data.

1. Click on the **Open PDF** button to open the driver report as a PDF document.

NOTE
The PDF document will open in a separate browser tab or window. You may need to allow pop-ups from the DASH Portal in your browser to view the PDF document.

NOTE
The PDF document will always display all policies and claims in the expanded form. Please note that the first page of the PDF document shows the summary section of the driver report, and the subsequent pages show policies, claims, and previous inquiries.

2. Use your browser controls to print the PDF document.

2-7 Correcting a Driver Report

The DASH Portal allows you to correct some of the data in the driver report.

> **NOTE**
> The corrections in the DASH Portal are limited only to the fields described in this section. The DASH system also provides an option of correcting a wider number of fields through the "Request for Correction" process, in which a correction form is submitted to IBC.

> **IMPORTANT**
> You are responsible for proper data analysis and due diligence to determine if the correction is required.

Follow these steps to perform a driver report correction:

1. Search for a driver (see Section 2-1 Searching for a Driver and 2-2 Using Advanced Search).
2. Display the driver report (see Section 2-3 Viewing the Driver Report).
3. Click on the **Edit Mode** switch at the top of the screen.

> **NOTE**
> Only authorized users can perform corrections in the DASH Portal. If you are not authorized to perform corrections in the DASH Portal, you will not see the **Edit Mode** switch on your screen.
> Please contact your User Administrator to obtain the required authorization.

Driver Report   Edit Mode 🔴   Open PDF   Back

John A. Smith [Edit]

DLN: **S1234-15678-19123 Ontario**
Date of Birth: **1980-01-31** [Edit]

Reference: **ABC-12345**
Report Date: **2021-08-22 09:32:03**
Last Update: **2021-08-02**
Requestor: **Jack Jackson / ABX Brokers**
Company: **ABC Insurance**
Years of Data: **25**

Address: 45 First Street, Smalltown, ON, B7B 7B7 [Edit]
Number of Policies at this Address ⓘ: 1
Gender: **Male** [Edit]
Marital Status: **Married** [Edit]
Years Licensed: **12** [Edit]
Years of Continuous Insurance ⓘ: 12
Years Claims Free ⓘ: 0
Driver Training: **No** [Edit]

Number of Claims in Last 6 Years ⓘ: 4
Number of At-Fault Accidents in Last 6 Years: 3
Number of Comprehensive Losses in Last 6 Years: 0
Number of DCPD Claims in Last 6 Years: 1

Alberta Operator Grid Level: N/A
Alberta Operator Grid Indicator: N/A
Alberta Grid Rating Date: N/A [Edit]

Policies ⬇

▼ 2020-03-31 to 2022-03-31   Canadian Insurance Company   *OVERLAP*   Cancelled – insured's request [Edit]

Policy #: **CIC-012345 / Canadian Insurance Company**
Policyholder Name: **John A. Smith**
Policyholder Address: **45 First Street, Smalltown, ON, B7B 7B7**
Number of Operators ⓘ: 1
Number of Vehicles ⓘ: 1

Effective Date: **2017-03-31**
Expiry Date: **2020-03-31**
Cancellation Date: **2020-03-31** [Edit]

Operator: **John A. Smith**
DLN: **S1234-15678-19123 Ontario**
Relationship to Policyholder: **Self**
Years Licensed: **12**
Year of Birth: **1980**

Vehicle #1: **Principal Operator**
Start of the Earliest Term: **2020-03-31**
End of the Latest Term: **2022-03-31**

Vehicle #1: **2015 Ford Focus - 1FL81H7TM02038457**
Vehicle Use: **Pleasure**
Vehicle Class: **01 / Private Passenger Vehicle**

Coverage: **AB, CL, CM**
Commuting Distance One-Way / Annual: **40 / 36000**
Business Use: **20%**

Claims ⬇

▼ Date of Loss: 2020-05-25   ABC Insurance Company   At-fault: 0% [Edit]

Policyholder Name: **John A. Smith**
Policyholder Address: **45 First Street, Smalltown, ON, B7B 7B7**
Policy #: **ABC-12345 / ABC Insurance Company**
Claim #: **CX-54321**

Coverage: **AB, CL**
Date Reported: **2021-05-31**
Claim Status: **Open**

Total Loss: **$5,540.00**
Total Expense: **$220.00**

KOL20 – Collision: $2,500.00 (loss); $220.00 (expense);
KOL86 – Examinations: $0.00 (loss); $0.00 (expense);
KOL41 – Medical: $3,040.00 (loss); $0.00 (expense); RESERVE (23/06);

Vehicle: **2015 Ford Focus – 1FL81H7TM02038457** [Edit]
Vehicle Class: **01 / Private Passenger Vehicle**
Vehicle Loss: **Partial** [Edit]

First Party Driver: **John A. Smith** [Edit]
First Party Driver DLN: **S1234-15678-19123 Ontario**
First Party Driver Date of Birth: **1980-01-31**
First Party Driver Listed on Policy: **Yes**
First Party Driver Excluded: **No** [Edit]
First Party Driver At-Fault: **0%**

Third Party Driver: *****
Third Party Driver DLN: *****
Third Party Driver Insurer Name: **Top Insurance Co.**
Third Party Driver Policy #: **TIC-0129388**
Third Party Driver At-Fault: **0%**

Drivers

NOTE
The image on the previous page is for illustration purposes only. The values displayed in the sample do not represent real data.

4. When the edit mode is on, an **Edit** button is displayed next to each field that can be corrected.

IMPORTANT
You can only correct the data in the driver report that was provided by your company. The DASH Portal will not allow you to correct any data that was provided by other companies.

5. Click on the **Edit** button next to the field that you want to correct.
6. A dialogue box will be displayed showing the current value and allowing you to enter or select the correct value for the selected field.
7. If you are correcting one of the following fields, enter the correct value in the text box as a free text:
   - The driver's name (first, middle and last)
   - The driver's date of birth
   - The driver's address (street, town, province and postal code)
   - The number of years the driver has been licensed
   - The driver's Alberta grid rating date
   - Policy cancellation date for any of the policies in the report (must be in YYYY-MM-DD format).

Address

Current Address

Cancel   Save

8. Click on the **Save** button to save the correct value.
9. If you are correcting one of the following fields, select the correct value from the drop-down menu:
   - The driver's gender
   - The driver's marital status
   - The driver's training indicator
   - Policy status for any of the policies in the report
   - The driver's at-fault percentage in claims
   - Vehicle identification number (VIN) in claims
   - Vehicle loss indicator in claims
   - The first-party driver in claims
   - The first-party driver excluded in claims

Marital Status

Married	▼

Cancel   Save

10. Click on the **Save** button to save the correct value.

NOTE
When correcting the VIN associated with the claim, you will be able to select another vehicle listed on the same policy.

NOTE
When correcting the first-party driver associated with the claim, you will be able to select another operator listed on the same policy.

Drivers

TROUBLESHOOTING

- **The Edit Mode switch is not available:** Please contact your User Administrator.
- **The Edit button is not displayed for the field I want to correct:** You can only correct the fields listed in the section above. For any other corrections, please consider submitting Request for a Correction form to IBC. For more information, please contact your DASH Representative. You cannot correct the data provided by other insurers.
- **The correct value is not available in the drop-down menu:** The drop-down menu provides all valid values that can be selected. If your correction requires a value not available in the drop-down menu, please consider submitting a Request for Correction form to IBC. For more information, please contact your DASH Representative.

3 History

The History function allows you to search, access and review the driver reports that were generated in the past.

The search can be performed based on a number of filter fields that allow you to pinpoint the exact driver report. You can search through all driver reports generated by the users from your assigned companies.

The list of past driver reports can also be exported in CSV format.

3-1 Searching for Past Reports

DASH keeps a record of all driver reports that have been generated in the past. You can find these past driver reports by using the History function in DASH.

> **IMPORTANT**
> You can only view past reports generated for the companies that are assigned to you. To get access to a specific company, please contact your User Administrator.

Follow these steps to find the specific driver report that was generated in the past:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **History** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to History (see Section 1-4 Navigation).

3. The History search screen is presented:

Organization	All ▼
Company	All ▼
Unit	All ▼
Requestor's Name	
Report Date	From YYYY-MM-DD 📅 To YYYY-MM-DD 📅
Comment	
Driver's License Number	
Driver's Name	

Search **Reset** **Export**

4. Select the *Organization* where the report requestor is employed.

> **NOTE**
> The organization drop-down menu is populated with all organizations that are assigned to you. If you need access to ant organization hat is not on the list, please contact your User Administrator.

> **NOTE**
> The organization selection is optional. You can leave the organization un-selected, in which case your search will return the past driver reports regardless of the organization.

5. Select the *Company* where the report requestor is employed.

> **NOTE**
> The company drop-down menu is populated with all companies that are assigned to you. If you need access to a company that is not on the list, please contact your User Administrator.

> **NOTE**
> The company selection is optional. You can leave the company un-selected, in which case your search will return the past driver reports regardless of the company.

6. Select the *Unit* where the report requestor is employed.

> **NOTE**
> The unit drop-down menu is populated with all units that are defined for the selected company. If your company does not have any units defined, this drop-down menu will be disabled.

History

NOTE
The unit selection is optional. You can leave the unit un-selected, in which case your search will return the past driver reports regardless of the unit.

7. Enter the *Requestor's Name* – requestor is the person who originally requested the driver report.

NOTE
By default, the field is populated with your name.

NOTE
As you start typing the name, DASH will show you the list of the results that match the text you are entering. You can then select a name from the list.

NOTE
The requestor name is optional. You can leave the name blank, in which case your search will return the past driver reports regardless of the requestor.

8. Enter the *Report Date* range when the driver report was requested.

NOTE
By default, the date range is set to the period from three months ago to the current date.

NOTE
You can populate the dates by entering the date in YYYY-MM-DD format, or selecting a date from the calendar.

NOTE
The date range is optional. You can enter just one of the dates, or leave both dates empty, in which case your search will return the past driver reports regardless of the date they were requested.

9. Enter the *Comment* that was used when the driver report was requested.

NOTE
You can enter the full comment or just a part of the comment. Your search will return the driver reports where the comment contains the text you have entered.

NOTE
The comment is optional. You can leave it empty, in which case your search will return the past driver reports regardless of the comment.

10. Enter the *Driver's License Number* (DLN) that was used when the driver report was requested.

NOTE
You can enter the full DLN or just a part of the DLN. Your search will return the driver reports in which the DLN contains the text you have entered.

NOTE
The DLN is optional. You can leave it empty, in which case your search will return the past Driver Reports regardless of the DLN.

11. Enter the *Driver's Name*.

> **NOTE**
> You can enter the full driver name or just a part of the driver name. Your search will return the driver reports in which the driver name contains the text you have entered.

> **NOTE**
> The driver name is optional. You can leave it empty, in which case your search will return the past driver reports regardless of the driver's name.

12. Click on the **Search** button to view the list of results.

> **NOTE**
> You can click on the **Reset** button to clear all the fields in the search criteria.

13. The DASH Portal will display the list of all past driver reports that match your search criteria.

Organization	Company	Unit	Requestor	Report Date	Comment	DLN	Driver	
Org A	Comp X	Unit 1	Susan Brown	2023-03-22 22:11:33	CC-132435	S1234-12345-1234	John Smith	View ▶
Org A	Comp X	Unit 1	Susan Brown	2023-03-22 22:11:33	CC-132435	S1234-12345-1234	John Smith	View ▶
Org A	Comp X	Unit 1	Susan Brown	2023-03-22 22:11:33	CC-132435	S1234-12345-1234	John Smith	View ▶

3 results found

> **NOTE**
> The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

> **TROUBLESHOOTING**
>
> - **The History function is not available in the menu:** Please contact your User Administrator.
> - **The organization is not showing in the drop-down menu:** The list only includes the organizations assigned to you. If you need access to additional organizations, please contact your User Administrator.
> - **The company is not showing in the drop-down menu:** The list only includes the companies assigned to you for the History function. If you need access to additional companies, please contact your User Administrator.
> - **The requestor's name is not showing in the list:** You can only see the requestors from your assigned company or companies.
> - **The driver report is not showing in the list:** Please check your search criteria. Also, note that the history may be limited to past 7 years of driver reports.
> - **Zero results found:** Please modify your search criteria – consider removing some of the search field values to relax the search criteria.

3-2 Viewing Past Reports

After you perform a successful search for past driver reports (see Section 3-1 Searching for Past Reports), the DASH Portal will display the list of driver reports that match your search criteria:

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

NOTE
The online report displays 100 results per page. You can navigate through the pages by using the page navigation at the bottom of the result table.

The result list displays the following columns:

- **Organization** – the organization for which the report is requested. This corresponds to the organization at which the report requestor is employed.
- **Company** – the company for which the report is requested. This corresponds to the company at which the report requestor is employed.
- **Unit** – the company unit for which the report was requested. This represents the unit at which the requestor is employed.
- **Requestor** – the name of the user who requested the driver report. If the driver report was requested through a client application, and not through the DASH Portal, then this field will display "API".
- **Report Date** – the date when the driver report was requested.
- **Comment** – the comment that was used when the driver report was requested.
- **DLN** – the driver's license number of the driver who was the subject of the driver report.
- **Driver** – the name of the driver who was the subject of the driver report.
- **View ▶** – link that allows you to view the Driver Report.

1. Click on the **View ▶** link to view the desired driver report.
2. The DASH Portal will display the driver report that you have selected.

IMPORTANT
The driver report will be displayed exactly as generated on the original report date indicated in the top right corner of the report. Any changes in the driver's data that occurred after the original report date will not be reflected in the report.

3-3 Exporting Past Reports

After you perform a successful search for past driver reports (see Section 3-1 Searching for Past Reports), The DASH Portal will display the list of driver reports that match your search criteria:

Organization	**Company**	**Unit**	**Requestor**	**Report Date**	**Comment**	**DLN**	**Driver**	
Org A	Comp X	Unit 1	Susan Brown	2023-03-22 22:11:33	CC-132435	S1234-12345-1234	John Smith	View ▶
Org A	Comp X	Unit 1	Susan Brown	2023-03-22 22:11:33	CC-132435	S1234-12345-1234	John Smith	View ▶
Org A	Comp X	Unit 1	Susan Brown	2023-03-22 22:11:33	CC-132435	S1234-12345-1234	John Smith	View ▶

(Search form: Organization: All, Company: All, Unit: All, Requestor's Name, Report Date From YYYY-MM-DD To YYYY-MM-DD, Comment, Driver's License Number, Driver's Name, Search / Reset / Export, 3 results found)

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

1. Click on the **Export** button to export the list to a CSV file.
2. The DASH Portal will export the data and download the CSV file to your computer.

NOTE
The CSV file will contain all the results that are matching your search criteria.

TROUBLESHOOTING

- **I cannot find the downloaded CSV file:** Please check your browser settings for the location of downloads. The CSV file name will have format "History Report YYYY-MM-DD - YYYY-MM-DD.csv", where YYYY-MM-DD - YYYY-MM-DD represent the date range used in your search.
- **I cannot open the CSV file:** Please check the default program that your computer uses to open CSV files. Typically, CSV files can be opened with Excel or a similar program.

4 90 Days

When you generate a driver report, DASH keeps track of any changes in the driver's data for 90 days. If any critical changes in the driver's data are detected, DASH allows you to search and review these changes though the 90 Days function.

The search can be performed based on a number of filter fields that allow you to pinpoint the exact driver report. You can search through all driver reports generated by the users from your assigned companies.

A list of changed reports can be reviewed, with the critical changes outlined. You can also access the current version of the driver report that includes all recent changes.

The list of changed driver reports can also be exported in CSV format.

4-1 Searching for Changed Reports

After you generate a driver report, DASH will keep track of any new information on the driver in the next 90 days. If any critical changes in the driver's information are detected within the 90 days of the report date, DASH will allow you to review these changes through the 90 Days function.

> **IMPORTANT**
> DASH will consider the following changes in the driver report as critical:
> - Change in the status of any of the policies listed in the report (e.g., cancellation of a policy)
> - Change in the number of claims listed in the report (e.g., a new claim reported)
> - Change in the driver's at-fault percentage for any of the claims listed in the report
>
> All other changes in the driver report are considered non-critical and are not included in the 90 Days report.

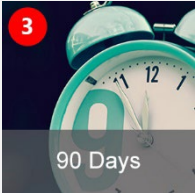Follow these steps to retrieve the list of driver reports that had critical changes within 90 days:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **90 Days** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to 90 Days (see Section 1-4 Navigation).

> **NOTE**
> The 90 Days tile on the landing page may display a badge which shows the number of changes that you haven't yet reviewed:

3. 90 Days screen is presented:

4. Select the *Organization* where the report requestor is employed.

> **NOTE**
> The organization drop-down menu is populated with all of the organizations assigned to you. If you need access to an organization that is not on the list, please contact your User Administrator.

> **NOTE**
> The organization selection is optional. You can leave the organization un-selected. In this case, your search will return the changed driver reports regardless of the organization.

5. Select the *Company* where the report requestor is employed.

> **NOTE**
> The company drop-down menu is populated with all of the companies assigned to you. If you need access to a company that is not on the list, please contact your User Administrator.

> **NOTE**
> The company selection is optional. You can leave the company un-selected. In this case, your search will return the changed driver reports regardless of the company.

6. Select *Unit* where the report requestor is employed.

> **NOTE**
> The unit drop-down menu is populated with all of the units that are defined for the selected company. If your company does not have any units defined, this drop-down menu will be disabled.

> **NOTE**
> The unit selection is optional. You can leave the unit un-selected, in which case your search will return the changed driver reports regardless of the unit.

7. Enter the *Requestor's Name* – the name of the person who requested the driver report.

> **NOTE**
> A partial search is allowed. The result will be identified even if it is not the exact match but contains the value entered in the search field.

> **NOTE**
> The requestor's name is optional. You can leave the name blank, in which case your search will return the changed driver reports regardless of the requestor.

8. Enter the *Change Date* range when the driver report was changed.

> **NOTE**
> By default, the date range is set to the period from three months ago to the current date.

> **NOTE**
> You can populate the dates by entering the date in YYYY-MM-DD format or selecting a date from the calendar.

> **NOTE**
> The date range is optional. You can enter just one of the dates or leave both dates empty, in which case your search will return the changed driver reports regardless of the date they were changed.

9. Select the *Status* of the changed report.

> **NOTE**
> The status indicates if the changed report was reviewed or not. If you select status "All" the search will return all reports, regardless of whether they were reviewed or not.

10. Click on the **Search** button to view the list of results matching your search criteria.

NOTE
You can click on the [**Reset**] button to clear all of the fields in the search criteria.

11. The DASH Portal will display the list of all changed driver reports that match your search criteria.

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

TROUBLESHOOTING

- **The 90 Days function is not available in the menu:** Please contact your User Administrator.
- **The organization is not showing in the drop-down menu:** The list only includes the organizations assigned to you. If you need access to additional organizations, please contact your User Administrator.
- **The company is not showing in the drop-down menu:** The list only includes the companies assigned to you for the History function. If you need access to additional companies, please contact your User Administrator.
- **The requestor's name is not showing in the list:** You can only search for the requestors from your assigned company or companies.
- **Zero results found:** Please modify your search criteria – consider removing some of the search field values to relax the search criteria.

4-2 Viewing Changed Reports

After you perform a successful search for changed driver reports (see Section 4-1 Searching for Changed Reports), the DASH Portal will display the list of driver reports that match your search criteria:

> **NOTE**
> The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

> **NOTE**
> The online report displays 100 results per page. You can navigate through the pages by using the page navigation at the bottom of the result table.

The result list displays the following columns:

- **Organization** – the organization at which the report requestor is employed.

- **Company** – the company at which the report requestor is employed.
- **Requestor** – the name of the user who requested the driver report. If the driver report was requested through a client application and not through the DASH Portal, then this field will display "API."
- **Report Date** – the date when the driver report was requested.
- **Change Date** – the date of the latest change that was made to the driver report.
- **Comment** – the comment that was used when the driver report was requested.
- **DLN** – the driver's license number of the driver who was the subject of the driver report.
- **Changes** – the type of the change(s) that were detected in the driver's information within 90 days from the report date. One or more of the following types of changes are listed in this column:
  - o **# Claims** – There was a change in the number of claims in the driver report.
  - o **At-fault** – There was a change in the driver's at-fault percentage in one or more of the claims listed in the driver report.
  - o **Status** – There was a change in the status of one or more of the policies listed in the driver report.
- **Review ▶** – link that allows you to review the changed driver report.

1. Click on the **Review ▶** link to view the desired driver report.
2. The DASH Portal will display the driver report that you have selected.

> **IMPORTANT**
> The driver report will display the information as of the current date. Any changes in the driver's data that occurred after the original report date will be reflected in the report.

4-3 Exporting Changed Reports

After you perform a successful search for changed driver reports (see Section 4-1 Searching for Changed Reports), the DASH Portal will display the list of driver reports that match your search criteria:

Organization	All
Company	All
Unit	All
Requestor's Name	
Change Date	From YYYY-MM-DD To YYYY-MM-DD
Status	All

Search   Reset   Export

3 results found

Organization	Company	Requestor	Report Date	Change Date	Comment	DLN	Change	Reviewed By	
Org A	Comp X	Ann Brown	2023-03-22 2...	2023-05-13	CC-132435	S123412345	# Claims		Review ▶
Org A	Comp X	Ann Brown	2023-03-22 2...	2023-05-13	CC-132435	S123412345	At-fault	Tom Black	Review ▶
Org A	Comp X	Ann Brown	2023-03-22 2...	2023-05-13	CC-132435	S123412345	Status	Tom Black	Review ▶

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

1. Click on the **Export** button to export the list to a CSV file.
2. The DASH Portal will export the data and download the CSV file to your computer.

NOTE
The CSV file will contain all of the results that match your search criteria.

TROUBLESHOOTING

- **I cannot find the downloaded CSV file:** Please check your browser settings for the location of downloads. The CSV file name will have format "90-Days Report YYYY-MM-DD - YYYY-MM-DD.csv," where YYYY-MM-DD - YYYY-MM-DD represent the date range used in your search.
- **I cannot open the CSV file:** Please check the default program that your computer uses to open CSV files. Typically, CSV files can be opened with Excel or a similar program.

5 Vehicles

The Vehicles function allows you to search and review the insurance history information for a specific vehicle.

The search can be performed based on the vehicle identification number (VIN). The vehicle report contains detailed information about the vehicle's insurance coverage and claims history as well as any available vehicle branding information.

5-1 Searching for a Vehicle

The vehicle report provides detailed information on a vehicle's history, including the history of its insurance policies and claims.

To obtain the report for a specific vehicle, you need to identify the vehicle using the vehicle identification number (VIN).

Follow these steps to find the specific vehicle and obtain the vehicle report:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Vehicles** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Vehicles (see Section 1-4 Navigation).

3. The Vehicles search screen is presented:

Vehicle Identification Number (VIN)	
	Search **Reset**

4. Enter the *Vehicle Identification Number (VIN)*.

> **NOTE**
> A VIN is typically 17 characters long. However, DASH may also include information on some VINs that are fewer than 17 characters long.

> **IMPORTANT**
> The DASH Portal will not validate the entered VIN. As a general rule, the letters I, O and Q are never used in a VIN to avoid mistakes of misreading. No special characters or spaces are allowed in the VIN.

5. Click on the **Search** button to request the vehicle report.

> **NOTE**
> You can click on the **Reset** button to clear the VIN field.

6. The DASH Portal will display the requested vehicle report on the screen.

Vehicles

Vehicle Report

3GYFK62817G278819

Model Year: 2007
Make: Cadillac
Model: Escalade EXT 4DR AWD

Report Date: 2021/08/22 09:32:03
Last Update: 2021/08/02
Requestor: Jack Jackson
Company: ABC Insurance

Vehicle Code: 513500
GVW: 2648kg
Branding: Salvage

Claims — Total Loss: $11,600.00 — Total Expense: $0.00

Date of Loss: 2020/09/07
Insurer: ABC Insurance Company
Policy #: ABC-012345
Claim #: ABCC-0993
Claim Status: Closed

Vehicle Loss: Total
Total Loss: $7600.00
Total Expense: $0.00
KOL18 – Loss of Use: $300.00 (loss);
KOL20 – Collision: $7300.00 (loss);

Date of Loss: 2017/11/15
Insurer: XYZ Insurance Company
Policy #: XYZ-543210
Claim #: CABX-0563
Claim Status: Closed

Vehicle Loss: Partial
Total Loss: $2000.00
Total Expense: $0.00
KOL16 – Other Property Damage to the Insured Vehicle: $1000.00 (loss);
KOL18 – Loss of Use: $300.00 (loss);
KOL20 – Collision: $700.00 (loss);

Date of Loss: 2012/04/01
Insurer: Canadian Insurance Company
Policy #: CIC-454545
Claim #: CIC-0434063
Claim Status: Closed

Vehicle Loss: Partial
Total Loss: $2000.00
Total Expense: $0.00
KOL16 – Other Property Damage to the Insured Vehicle: $1000.00 (loss);
KOL18 – Loss of Use: $300.00 (loss);
KOL20 – Collision: $700.00 (loss);

Policies

Coverage Period: 2020/03/31 – 2022/03/31
Insurer: ABC Insurance Company
Policy #: ABC-012345
Policy Status: Active

Vehicle Use: Pleasure
Type of Use / Vehicle Class: 01
Business Use: 20%
Commuting Distance One-Way / Annual: 40/36000

Coverage Period: 2017/03/31 – 2020/03/31
Insurer: XYZ Insurance Company
Policy #: XYZ-543210
Policy Status: Cancelled at insured's request

Vehicle Use: Pleasure
Type of Use / Vehicle Class: 01
Business Use: 0%
Commuting Distance One-Way / Annual: 10/15000

Coverage Period: 2008/03/31 – 2017/03/31
Insurer: Canadian Insurance Company
Policy #: CIC-454545
Policy Status: Cancelled at insured's request

Vehicle Use: Pleasure
Type of Use / Vehicle Class: 01
Business Use: 0%
Commuting Distance One-Way / Annual: 20/20000

NOTE
You can click on the **Back** button to return to the search screen.

TROUBLESHOOTING

- **The Vehicles function is not available in the drop-down menu:** Please contact your User Administrator.
- **No results found:** Please check that the entered VIN is correct.

5-2 The Content of a Vehicle Report

The vehicle report provides detailed insurance history for the vehicle, including all policies and claims.

> **NOTE**
> The term **the vehicle** refers to the specific vehicle that was selected through the search (see Section 5-1 Searching for a Vehicle).

The content of the report includes the following sections:

- Summary section
- Claims section
- Policies section.

Summary Section

3GYFK62817G278819	Report Date: **2021/08/22 09:32:03**
Model Year: **2007**	Last Update: **2021/08/02**
Make: **Cadillac**	Requestor: **Jack Jackson**
Model: **Escalade EXT 4DR AWD**	Company: **ABC Insurance**
Vehicle Code: **513500**	
GVW: **2648kg**	
Branding: **Salvage**	

VIN – the vehicle identification number of the vehicle.

Model Year – the model year of the vehicle.

Make – the make of the vehicle. In some cases, the make may display multiple values, if the unique value cannot be determined.

Model – the model of the vehicle. In some cases, the model may display multiple values, if the unique value cannot be determined.

Report Date – the date and time when the report was generated.

Last Update – the date when IBC received the most recent data presented in the report.

Requestor – the first and last name of the person who requested the report.

Company – the company for which the report was requested. It represents the company in which the requestor is employed.

Vehicle Code – the vehicle code of the vehicle.

Gross Vehicle Weight (GVW) – the gross vehicle weight in kilograms.

Branding – the branding status of the vehicle.

Vehicles

Claims Section

This section shows all claims where the vehicle was listed.

> **NOTE**
> The claims are sorted with the newest claims at the top and the oldest claims at the bottom.

Claims	Total Loss: $11,600.00	Total Expense: $0.00
Date of Loss: **2020/09/07** Insurer: **ABC Insurance Company** Policy #: **ABC-012345** Claim #: **ABCC-0993** Claim Status: **Closed**		Vehicle Loss: **Total** Total Loss: **$7600.00** Total Expense: **$0.00** KOL18 – Loss of Use: **$300.00 (loss);** KOL20 – Collision: **$7300.00 (loss);**
Date of Loss: **2017/11/15** Insurer: **XYZ Insurance Company** Policy #: **XYZ-543210** Claim #: **CABX-0563** Claim Status: **Closed**		Vehicle Loss: **Partial** Total Loss: **$2000.00** Total Expense: **$0.00** KOL16 – Other Property Damage to the Insured Vehicle: **$1000.00 (loss);** KOL18 – Loss of Use: **$300.00 (loss);** KOL20 – Collision: **$700.00 (loss);**
Date of Loss: **2012/04/01** Insurer: **Canadian Insurance Company** Policy #: **CIC-454545** Claim #: **CIC-0434063** Claim Status: **Closed**		Vehicle Loss: **Partial** Total Loss: **$2000.00** Total Expense: **$0.00** KOL16 – Other Property Damage to the Insured Vehicle: **$1000.00 (loss);** KOL18 – Loss of Use: **$300.00 (loss);** KOL20 – Collision: **$700.00 (loss);**

> **NOTE**
> The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

Total Loss – total loss aggregated across all claims where the vehicle was listed.

Total Expense – total expense aggregated across all claims where the vehicle was listed.

Date of Loss – the date of loss (or the accident date) for the claim.

Insurer – the name of the insurance company that issued the policy under which the claim was submitted.

Policy # – the policy number under which the claim was submitted.

Claim # – the claim number.

Claim Status – the status of the claim (open or closed).

Vehicle Loss – the indicator showing if the vehicle suffered a total or a partial loss.

Total Loss – the total amount of loss accumulated on the claim as of the report date.

Total Expense – the total amount of expense accumulated on the claim as of the report date.

KOL List – the list showing the breakdown of the total loss and total expense by kind of loss (KOL). The list shows one line per kind of loss reported for the claim. Each line includes the kind of loss code and description as well as the total amount of loss and expense accumulated on the claim for that kind of loss as of the report date.

Vehicles

Policies Section

This section shows all policies where the vehicle was listed.

Policies	
Coverage Period: **2020/03/31 – 2022/03/31** Insurer: **ABC Insurance Company** Policy #: **ABC-012345** Policy Status: **Active**	Vehicle Use: **Pleasure** Type of Use / Vehicle Class: **01** Business Use: **20%** Commuting Distance One-Way / Annual: **40/36000**
Coverage Period: **2017/03/31 – 2020/03/31** Insurer: **XYZ Insurance Company** Policy #: **XYZ-543210** Policy Status: **Cancelled at insured's request**	Vehicle Use: **Pleasure** Type of Use / Vehicle Class: **01** Business Use: **0%** Commuting Distance One-Way / Annual: **10/15000**
Coverage Period: **2008/03/31 – 2017/03/31** Insurer: **Canadian Insurance Company** Policy #: **CIC-454545** Policy Status: **Cancelled at insured's request**	Vehicle Use: **Pleasure** Type of Use / Vehicle Class: **01** Business Use: **0%** Commuting Distance One-Way / Annual: **20/20000**

Coverage Period Start Date – the start date represents the date when the vehicle coverage under that policy started. Depending on the situation, this can be the date when the policy came into effect or the date when the vehicle was added to the policy (whichever is later).

Coverage Period Stop Date – the stop date represents the date when the vehicle coverage under that policy ended. Depending on the situation, this can be the date when the policy expired (or will expire) or was cancelled, or the date when the vehicle was deleted from the policy (whichever is the earliest).

Insurer – the name of the insurance company that issued the policy.

Policy # – the policy number.

Policy Status – the status of the policy as of the report date. The possible statuses are:

- **Active** – the policy is in effect as of the report date.
- **Expired** – the policy is expired as of the report date.
- **Cancelled for non-payment** – the policy is cancelled for nonpayment as of the report date.
- **Cancelled due to policy renewal not taken** – the policy is cancelled due to renewal not taken as of the report date.
- **Cancelled based on underwriting** – the policy is cancelled based on underwriting as of the report date.
- **Cancelled for material misrepresentation** – the policy is cancelled for material misrepresentation as of the report date.
- **Cancelled at insured's request** – the policy is cancelled at insured's request as of the report date.
- **Cancelled for any other reason** – the policy is cancelled for any other reason not listed above as of the report date.

Vehicle Use – the vehicle use as reported by the insurer.

Type of Use / Vehicle Class – the type of use code, as defined in the Automobile Statistical Plan (ASP) and the corresponding vehicle class.

Business Use – the percentage of the business use for the vehicle.

Commuting Distance One-Way / Annual – the commuting distance for the vehicle (one way and annual), shown in kilometres.

6 Company

The Company function allows you to manage some of the settings for your company.

These settings include the definition of any organizational units in the company, the definition of number-of-year options for the driver reports, the definition of permitted email domains for company users and the definition of notification recipients for supplementary data submissions.

6-1 Viewing a Company Profile

Every company with access to DASH will have its profile defined in the DASH Portal. The company profile includes settings related to the following:

- **Organizational Units** – each company has an option of defining organizational units, which may represent different teams, departments, regions, or similar in the company. Defining the units allows the company to use them as a part of a filter in various DASH functions (e.g., History, 90 Days, Usage, etc.). The company may choose not to define any units in its profile.
- **Driver Report – Number-of-Years Options** – each company needs to define one or more Number-of-Years Options that will be used when requesting a driver report. These options will be displayed in the number-of-years drop-down menu (see Section 2-1 Searching for a Driver). The options represent the number of years of data that will be included in the driver report and should reflect the business needs of the company.
- **User Account – Permitted Email Domains** – each company needs to define one or more permitted email domains for the user accounts that belong to that company. When user accounts are created for that company, the email addresses used in these accounts need to belong to one of the permitted email domains.
- **Supplementary Data Collection – Notification Recipients** – each time a company submits supplementary data, DASH sends a confirmation notification email that includes the information on any errors detected in the supplementary data. Each company can define and manage the list of recipients of this notification email.

> **IMPORTANT**
> The Company function manages sensitive company information. Access to the Company function is restricted to a small set of authorized users.

Follow these steps to view and manage the company profile:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Company** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Company (see Section 1-4 Navigation).

3. The Company screen is presented:

Organization	Sample Parent Organization 12345 ▼
Company	Sample Company 678 ▼

4. Select the *Organization* (parent company) related to the company that you want to access.

> **NOTE**
> The organization drop-down menu is populated with all organizations that are assigned to you. If you need access to an organization that is not on the list, please contact your User Administrator.

5. Select the *Company* for which you want to view the profile.

Company

6. The company profile for the selected company is displayed:

Organization	Sample Parent Organization 12345	▼
Company	Sample Company 678	▼

⬤○ IBC Credentials

Organizational Units		
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Add Unit ▶		

Driver Report – Number of Years Options	
Max Years – Sample Company 678 – Note	Delete ▶
25 Years – Sample Company 678	Delete ▶
6 Years – Sample Company 678 – Note	Delete ▶
Add Option ▶	

User Account – Permitted Email Domains	
@sample.com	Delete ▶
@sample.ca	Delete ▶
Add Domain ▶	

Supplementary Data Collection – Notification Recipients	
user1@sample.ca	Delete ▶
user2@sample.ca	Delete ▶
user3@sample.ca	Delete ▶
Add Recipient ▶	

6-2 Adding a Unit

You can add a new organizational unit to your company profile, when required. Follow these steps to add a new organizational unit:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).

2. The company profile for the selected company is displayed:

Organization	Sample Parent Organization 12345 ▾		
Company	Sample Company 678 ▾		

⬤ IBC Credentials

Organizational Units			
Sample Unit		Rename ▶	Delete ▶
Sample Unit		Rename ▶	Delete ▶
Sample Unit		Rename ▶	Delete ▶
Add Unit ▶			

Driver Report – Number of Years Options		
Max Years – Sample Company 678 – Note		Delete ▶
25 Years – Sample Company 678		Delete ▶
6 Years – Sample Company 678 – Note		Delete ▶
Add Option ▶		

User Account – Permitted Email Domains		
@sample.com		Delete ▶
@sample.ca		Delete ▶
Add Domain ▶		

Supplementary Data Collection – Notification Recipients		
user1@sample.ca		Delete ▶
user2@sample.ca		Delete ▶
user3@sample.ca		Delete ▶
Add Recipient ▶		

> **NOTE**
> The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **Add Unit ▶** link in the *Organizational Units* section.

4. A dialogue box will be displayed, allowing you to enter the name of the new unit:

Add Unit

Unit Name

Cancel	Save

5. Enter the name of the new unit and click on the **Save** button.

> **NOTE**
> You can click on the **Cancel** button to return to the profile screen without saving.

> **NOTE**
> The unit name must be unique. DASH will not allow you to create multiple units with the same name. The unit names are not case-sensitive.

6. DASH displays the new unit in the list.

6-3 Renaming a Unit

You can rename a unit in the company profile, when required. Follow these steps to rename a unit:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

Organization	Sample Parent Organization 12345	
Company	Sample Company 678	

IBC Credentials

Organizational Units

Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶

Add Unit ▶

Driver Report – Number of Years Options

Max Years – Sample Company 678 – Note	Delete ▶
25 Years – Sample Company 678	Delete ▶
6 Years – Sample Company 678 – Note	Delete ▶

Add Option ▶

User Account – Permitted Email Domains

@sample.com	Delete ▶
@sample.ca	Delete ▶

Add Domain ▶

Supplementary Data Collection – Notification Recipients

user1@sample.ca	Delete ▶
user2@sample.ca	Delete ▶
user3@sample.ca	Delete ▶

Add Recipient ▶

> **NOTE**
> The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **Rename ▶** link in the *Organizational Units* section next to the unit you want to rename.
4. A dialogue box will be displayed, allowing you to change the name of the existing unit:

Rename Unit

Current Unit Name

Cancel	Save

5. Enter the new name of the unit and click on the **Save** button.

> **NOTE**
> You can click on the **Cancel** button to return to the profile screen without saving.

> **NOTE**
> The unit name must be unique. DASH will not allow you to create multiple units with the same name. The unit names are not case-sensitive.

6. DASH displays the new unit name in the list.

6-4 Deleting a Unit

You can delete a unit in the company profile, when required. Follow these steps to delete a unit:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

Organization	Sample Parent Organization 12345	
Company	Sample Company 678	

◯ IBC Credentials

Organizational Units		
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Add Unit ▶		

Driver Report – Number of Years Options	
Max Years – Sample Company 678 – Note	Delete ▶
25 Years – Sample Company 678	Delete ▶
6 Years – Sample Company 678 – Note	Delete ▶
Add Option ▶	

User Account – Permitted Email Domains	
@sample.com	Delete ▶
@sample.ca	Delete ▶
Add Domain ▶	

Supplementary Data Collection – Notification Recipients	
user1@sample.ca	Delete ▶
user2@sample.ca	Delete ▶
user3@sample.ca	Delete ▶
Add Recipient ▶	

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **Delete** ▶ link in the *Organizational Units* section next to the unit you want to delete.
4. A dialogue box will be displayed, asking you to confirm the deletion.
5. Confirm the deletion.

NOTE
A unit cannot be deleted if there are any DASH users employed at the unit.

6. DASH displays the company profile with the deleted unit removed from the list.

TROUBLESHOOTING

- **I cannot delete a unit:** Make sure that there are no user accounts that have the unit selected in the Employed at Unit field. If needed, the user accounts can be modified and a different unit can be selected in the Employed at Unit field (see Section 7 User Administration).

6-5 Adding a Number-of-Years Option

You can add a new number-of-years option to your Company Profile, when required. Follow these steps to add a new number-of-years option:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

Organization	Sample Parent Organization 12345 ▼
Company	Sample Company 678 ▼

◯ **IBC Credentials**

Organizational Units		
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Add Unit ▶		

Driver Report – Number of Years Options		
Max Years – Sample Company 678 – Note	Edit ▶	Delete ▶
25 Years – Sample Company 678	Edit ▶	Delete ▶
6 Years – Sample Company 678 – Note	Edit ▶	Delete ▶
Add Option ▶		

User Account – Permitted Email Domains	
@sample.com	Delete ▶
@sample.ca	Delete ▶
Add Domain ▶	

Supplementary Data Collection – Notification Recipients	
user1@sample.ca	Delete ▶
user2@sample.ca	Delete ▶
user3@sample.ca	Delete ▶
Add Recipient ▶	

> **NOTE**
> The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **Add Option** ▶ link in the *Driver Report – Number-of-Years Options* section.
4. A dialogue box will be displayed, allowing you to enter a new number-of-years option:

Add Number-of-Years Option

25 Years ▼

Note (optional)

☑ Assign the option to all users
☑ Make the option default for all users

Cancel   **Save**

5. Select the number of years in the drop-down menu.

> **IMPORTANT**
> The available values are between 1 and 25 years and "Max (Alberta Grid)"
> The option "Max (Alberta Grid)" should be selected if your company requires the data used in the Alberta grid going back to October 1997.

6. Enter a note (optional).

Company

> **NOTE**
>
> The note may be used to provide more context for the number-of-years option. It may describe the province in which the option is used, department that uses the option or something similar. The note will be visible to all users who are requesting the driver report (see Section 2-1 Searching for a Driver) and is meant to provide additional clarity to the users. The note can also be left blank.

7. Select the "Assign the option to all users" checkbox if you want the option to be automatically added to all users employed at the company.
8. Select the "Make the option default for all users" checkbox if you want the option to be the default option for all users employed at the company.
9. Click on the **Save** button.

> **NOTE**
>
> You can click on the **Cancel** button to return to the profile screen without saving.

> **NOTE**
>
> The number-of-years option must be unique. DASH will not allow you to create duplicate options.

10. DASH displays the company profile with the new number-of-years option displayed in the list.

6-6 Editing a Number-of-Years Option

You can edit a number-of-years option in your Company Profile, when required. Follow these steps to edit a number-of-years option:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

| Organization | Sample Parent Organization 12345 |
| Company | Sample Company 678 |

IBC Credentials

Organizational Units		
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Add Unit ▶		

Driver Report – Number of Years Options		
Max Years – Sample Company 678 – Note	Edit ▶	Delete ▶
25 Years – Sample Company 678	Edit ▶	Delete ▶
6 Years – Sample Company 678 – Note	Edit ▶	Delete ▶
Add Option ▶		

User Account – Permitted Email Domains	
@sample.com	Delete ▶
@sample.ca	Delete ▶
Add Domain ▶	

Supplementary Data Collection – Notification Recipients	
user1@sample.ca	Delete ▶
user2@sample.ca	Delete ▶
user3@sample.ca	Delete ▶
Add Recipient ▶	

> **NOTE**
> The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **Edit ▶** link in the *Driver Report – Number-of-Years Options* section next to the option you want to edit.
4. A dialogue box will be displayed, allowing you to edit the number-of-years option:

Edit Number-of-Years Option

25 Years ▾

Note (optional)

Cancel   Save

5. Modify the number of years in the drop-down menu if needed.

> **IMPORTANT**
> The available values are between 1 and 25 years and "Max (Alberta Grid)" The option "Max (Alberta Grid)" should be selected if your company requires the data used in the Alberta grid going back to October 1997.

6. Modify the note if needed.

> **NOTE**
> The note may be used to provide more context for the number-of-years option. It may describe the province in which the option is used, department that uses the option or something similar. The note will be visible to all users who are requesting the driver report (see Section 2-1 Searching for a Driver) and is meant to provide additional clarity to the users. The note can also be left blank.

7. Click on the **Save** button.

> **NOTE**
> You can click on the **Cancel** button to return to the profile screen without saving.

> **NOTE**
> The number-of-years option must be unique. DASH will not allow you to create duplicate options.

8. DASH displays the company profile with the updated number-of-years option displayed in the list.

6-7 Deleting a Number-of-Years Option

You can delete the number-of-years option in the company profile, when required. Follow these steps to delete a number-of-years option:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **Delete ▶** link in the *Driver Report – Number-of-Years Options* section next to the option you want to delete.
4. A dialogue box will be displayed, asking you to confirm the deletion. The dialogue box will indicate if the option will be automatically removed from any users employed at the company.
5. Confirm the deletion.
6. DASH displays the company profile with the deleted option removed from the list.

TROUBLESHOOTING

- **I cannot delete a number-of-years option:** The option cannot be deleted if there are user accounts that have this option assigned as the only option in their user profile. Please assign a different option to these user accounts before the deletion.

6-8 Adding a Permitted Domain

<div style="background:#fdf6d8">

IMPORTANT
This functionality is available only to authorized IBC users.

</div>

You can add a new permitted domain to the company profile, when required. Follow these steps to add a new permitted domain:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

| Organization | Sample Parent Organization 12345 | |
| Company | Sample Company 678 | |

◯ IBC Credentials

Organizational Units
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶

Add Unit ▶

Driver Report – Number of Years Options
Max Years – Sample Company 678 – Note	Delete ▶
25 Years – Sample Company 678	Delete ▶
6 Years – Sample Company 678 – Note	Delete ▶

Add Option ▶

User Account – Permitted Email Domains
| @sample.com | Delete ▶ |
| @sample.ca | Delete ▶ |

Add Domain ▶

Supplementary Data Collection – Notification Recipients
user1@sample.ca	Delete ▶
user2@sample.ca	Delete ▶
user3@sample.ca	Delete ▶

Add Recipient ▶

<div style="background:#eee">

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

</div>

3. Click on the **Add Domain** ▶ link in the *User Account – Permitted Email Domains* section.
4. A dialogue box will be displayed, allowing you to enter the new permitted domain:

Add Permitted Domain

Domain (e.g. @company.com)

Cancel   Save

5. Enter the new permitted domain and click on the **Save** button.

<div style="background:#eee">

NOTE
You can click on the **Cancel** button to return to the profile screen without saving.

</div>

<div style="background:#eee">

NOTE
The permitted domain must be unique. DASH will not allow you to create duplicate permitted domains.

</div>

6. DASH displays the new permitted domain in the list.

6-9 Deleting a Permitted Domain

> **IMPORTANT**
> This functionality is available only to authorized IBC users.

You can delete a permitted domain in the company profile, when required. Follow these steps to delete a permitted domain:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

Organization	Sample Parent Organization 12345		
Company	Sample Company 678		

IBC Credentials

Organizational Units			
Sample Unit		Rename ▶	Delete ▶
Sample Unit		Rename ▶	Delete ▶
Sample Unit		Rename ▶	Delete ▶
Add Unit ▶			

Driver Report – Number of Years Options		
Max Years – Sample Company 678 – Note		Delete ▶
25 Years – Sample Company 678		Delete ▶
6 Years – Sample Company 678 – Note		Delete ▶
Add Option ▶		

User Account – Permitted Email Domains		
@sample.com		Delete ▶
@sample.ca		Delete ▶
Add Domain ▶		

Supplementary Data Collection – Notification Recipients		
user1@sample.ca		Delete ▶
user2@sample.ca		Delete ▶
user3@sample.ca		Delete ▶
Add Recipient ▶		

> **NOTE**
> The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **Delete** ▶ link in the *User Account – Permitted Email Domains* section next to the domain you want to delete.
4. A dialogue box will be displayed, asking you to confirm the deletion.
5. Confirm the deletion.

> **NOTE**
> A permitted domain cannot be deleted if there are any DASH user accounts with emails referring to the domain.

6. DASH displays the company profile with the deleted domain removed from the list.

> **TROUBLESHOOTING**
>
> - **I cannot delete a domain:** Make sure that there are no user accounts in which the User ID or Work Email fields use the domain. If needed, the user accounts can be modified and a different domain can be selected in the Work Email field. However, if the domain is used in the User ID field, then the user account has to be removed before the domain can be deleted (see Section 7 User Administration).

6-10 Adding a Notification Recipient

You can add a new notification recipient to your company profile, when required. Follow these steps to add a new notification recipient:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

3. Click on the **Add Recipient ▶** link in the *Supplementary Data Collection – Notification Recipients* section.
4. A dialogue box will be displayed, allowing you to enter the new notification recipient:

5. Enter the new notification recipient and click on the **Save** button.

NOTE
You can click on the **Cancel** button to return to the profile screen without saving.

IMPORTANT
The notification recipient must be a valid email address.

NOTE
The notification recipient must be unique. DASH will not allow you to create duplicate notification recipients.

6. DASH displays the company profile with the new notification recipient displayed in the list.

6-11 Deleting a Notification Recipient

You can delete a notification recipient in the company profile when required. Follow these steps to delete a notification recipient:

1. Access the company profile for the required company (see Section 6-1 Viewing a Company Profile).
2. The company profile for the selected company is displayed:

| Organization | Sample Parent Organization 12345 |
| Company | Sample Company 678 |

Organizational Units		
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Sample Unit	Rename ▶	Delete ▶
Add Unit ▶		

Driver Report – Number of Years Options	
Max Years – Sample Company 678 – Note	Delete ▶
25 Years – Sample Company 678	Delete ▶
6 Years – Sample Company 678 – Note	Delete ▶
Add Option ▶	

User Account – Permitted Email Domains	
@sample.com	Delete ▶
@sample.ca	Delete ▶
Add Domain ▶	

Supplementary Data Collection – Notification Recipients	
user1@sample.ca	Delete ▶
user2@sample.ca	Delete ▶
user3@sample.ca	Delete ▶
Add Recipient ▶	

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **Delete** ▶ link in the *Supplementary Data Collection – Notification Recipients* section next to the recipient you want to delete.
4. A dialogue box will be displayed, asking you to confirm the deletion.
5. Confirm the deletion.
6. DASH displays the company profile with the deleted notification recipient removed from the list.

7 Users

The Users function allows you to perform user administration tasks for your assigned companies.

User administration tasks include creating new user accounts, changing existing user accounts, disabling user accounts, enabling user accounts, and deleting user accounts.

User profiles contain detailed authorization settings for each user, including their access to DASH functions and assigned companies.

7-1 Searching for a User

If you have been designated the User Administrator for your company or companies, you will have access to the Users function in DASH.

The Users function allows you to search and manage the user accounts of all of the users from your assigned company or companies.

IMPORTANT
You can only access and manage accounts of users from the companies assigned to you. If you need to manage accounts of users from companies that are not assigned to you, please contact the administrator that created your account.

Follow these steps to find the specific user account:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Users** option.

NOTE
Alternatively, you can use the landing page tiles to navigate to Users (see Section 1-4 Navigation).

3. The Users search screen is presented:

Employed at Organization	All ▾
Employed at Company	All ▾
Employed at Unit	All ▾
Status	Enabled ▾
User ID	
Name	

Search   Reset   New User

4. Select the *Employed at Organization*.

NOTE
The organization drop-down menu is populated with all organizations that are assigned to you. If you need access to the user account from an organization that is not on the list, please contact IBC.

NOTE
The organization selection is optional. You can leave the organization un-selected, in which case your search will return the user accounts from all organizations assigned to you.

5. Select the *Employed at Company*.

IMPORTANT
A company cannot be selected unless an organization is selected first.

NOTE
The company drop-down menu is populated with all companies that are assigned to you and belong to the selected organization. If you need access to the user account from a company that is not on the list, please contact IBC.

Users

> **NOTE**
> Company selection is optional. You can leave the company un-selected, in which case your search will return the user accounts from all companies assigned to you, which belong to the selected organization.

6. Select the *Employed at Unit*.

> **IMPORTANT**
> A unit cannot be selected unless a company is selected first.

> **NOTE**
> The unit drop-down menu is populated with all of the units that belong to the selected company. If the company does not have any units defined, the drop-down menu will be empty.

> **NOTE**
> The unit selection is optional. You can leave the unit un-selected, in which case your search will return the user accounts from all of the units that belong to the selected company.

7. Select the *Status* of the user account.

> **NOTE**
> You can search for accounts that are enabled, accounts that are disabled or all accounts regardless of their status.

8. Enter the *User ID* of the user account.

> **NOTE**
> A partial search is allowed. The result will be identified even if it is not the exact match but contains the value entered in the search field.

> **NOTE**
> The User ID is optional. You can leave it blank, in which case your search will return the user accounts regardless of their User ID.

9. Enter the *Name* of the user.

> **NOTE**
> A partial search is allowed. The result will be identified even if it is not the exact match but contains the value entered in the search field. You can enter a first name, last name or any part of the name.
> You can also leave the name blank, in which case your search will return the user accounts regardless of their name.

10. Click on the **Search** button to view the list of results matching your search criteria.

> **NOTE**
> You can click on the **Reset** button to clear all of the fields in the search criteria.

11. The DASH Portal will display the list of all user accounts that match your search criteria.

Users

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

The result list displays the following columns:

- **User ID** – the user ID of the account.
- **Name** – the name of the user.
- **Employed at Organization** – the organization in which the user is employed.
- **Employed at Company** – the company at which the user is employed
- **Employed at Unit** – the unit at which the user is employed. If there are no units defined in the user's company, this field is blank.
- **Status** – status of the user account:
    - o **Enabled** – the user can access DASH.
    - o **Disabled** – the user cannot access DASH.
- **View ▶** – links that allow you to view the user profile.

7-2 Viewing a User Profile

After you perform a successful search for a user account (see Section 7-1 Searching for a User), the DASH Portal will display the list of user accounts that match your search criteria:

Employed at Organization	All						
Employed at Company	All						
Employed at Unit	All						
Status	Enabled						
User ID							
Name							

Search   **Reset**   **New User**

User ID	Name	Organization	Company	Unit	Status	Profile
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

NOTE
You can sort the result list by clicking on the header of the column that you would like to sort. Clicking repeatedly on the same header will alternate the column sort between ascending and descending order.

1. Click on the **View ▶** link to view the desired user profile.
2. The User Profile screen is displayed:

User Profile   **Disable Account**

Account Type	IBC Account
User ID	
Name	
Work Email	
MFA Phone	
Copy Profile From	
Employed at Organization	All
Employed at Company	All
Employed at Unit	All
Assigned Organizations	12345 ⊗ 22345 ⊗

Functions		Companies
☑ Drivers	☐ All	001 ⊗ 002 ⊗
☐ Edit Mode		
☑ History	☑ All	001 ⊗ 002 ⊗ 003 ⊗ 004 ⊗ 005 ⊗ 006 ⊗ 007 ⊗ 008 ⊗ 009 ⊗ +
☑ 90 Days	☐ All	001 ⊗ 002 ⊗
☑ Company	☐ All	001 ⊗ 002 ⊗
☐ Users		
☐ Usage		
☐ Access		
☐ Corrections		

Driver Report – Number of Years Options	Default
☑ 25 Years – Insurance Company One	◎
☑ 10 Years – Insurance Company One	◎
☑ 6 Years – Insurance Company Two	◎

Save   **Cancel**   **Resend Invitation**   **Delete Account**

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

Users

The user profile displays the following information:

- **Account Type** – the type of account (company account or IBC account).
- **User ID** – the User ID associated with the user account.
- **Name** – the name of the user (first, middle and last name).
- **Work Email** – the work email address of the user.
- **MFA Phone** – the phone number for multi-factor authentication. This field applies only to users with IBC issued credentials.
- **Copy Profile From** – when viewing the user profile, this field is blank and can be ignored. For more information on how this field is used, see Section 7-3 Adding a New User and 7-4 Editing a User Profile.
- **Employed at Organization** – the name of the organization at which the user is employed.
- **Employed at Company** – the name of the company at which the user is employed.
- **Employed at Unit** – the name of the unit at which the user is employed. If there are no units defined for the user's company, this field is blank.
- **Assigned Organizations** – the list of organizations that have been assigned to the user. The organizations are identified by the 5-digit numbers used in the Automobile Statistical Plan. The user can access different DASH functions for the child companies of the listed organizations.
- **Functions** – the list of DASH functions. The user has access to each function that has its checkbox selected.
- **Companies** – the list of assigned companies for which the user can perform the particular DASH function. The companies are identified with the 3-digit reporting company number used in the Automobile Statistical Plan. Some of the DASH functions do not require assigned companies. Checkbox "All" indicates that all child companies of the assigned organizations are selected.

- **Driver Report – Number-of-Years Options** – the list of number-of-year options that pertain to the companies assigned to the Driver Report function. The options that have the checkbox selected are available to the user in the number-of-years drop-down menu in the Driver Report search screen (see Section 2-1 Searching for a Driver). The "default" option shows as the default option in the number-of-years drop-down menu in the Driver Report search screen.

7-3 Adding a New User

You can add a new user account to DASH, when required. Follow these steps to add a new user account:

> **IMPORTANT**
> If the account is using company-issued credentials, make sure that the user account exists in your company's Active Directory.
> Alternatively, if the account is using IBC-issued credentials, the user account will be created in IBC's Active Directory automatically.

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Users** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Users (see Section 1-4 Navigation).

3. The Users search screen is presented:

Employed at Organization	All
Employed at Company	All
Employed at Unit	All
Status	Enabled
User ID	
Name	

Search   Reset   New User

4. Click on the **New User** button.

5. The User Profile screen is displayed:

> **NOTE**
> The above image is for illustration purposes only. The list of functions is subject to change.

6. Account Type is populated with the value that corresponds to your company settings and cannot be changed.
7. Populate the User ID field. In most cases, the User ID will match the user's email address. For users with IBC-issued credentials the user ID has the format user.company.com@account.ibc.ca.

> **IMPORTANT**
> For accounts that use company-issued credentials, the User ID must match the entry in the company's Active Directory; otherwise, the user will not be able to log in to the DASH Portal.

> **IMPORTANT**
> The domain of the User ID must be in the list of permitted domains for the company where the user is employed.

8. Populate the user's *Name*:
   - The first name is mandatory.
   - The middle name is optional and can be left blank.
   - The last name is mandatory.
9. Populate the user's *Work Email*.

> **NOTE**
> DASH will use the work email to send notifications to the user. The work email must be a valid email address.

> **IMPORTANT**
> The domain of the work email must be in the list of permitted domains for the company at which the user is employed.

10. Populate *MFA Phone*.

> **IMPORTANT**
> The MFA Phone is used only for accounts that use IBC-issued credentials. For accounts that use company-issued credentials, this field is disabled.

11. Use **Copy Profile From** field to copy the profile from another user account (optional).

> **IMPORTANT**
> The Copy Profile functionality allows you to pre-populate most of the fields in the new user's profile with values from an existing user account.
> To copy a profile, follow these steps:
> 1. Start typing the name of an existing user in the Copy Profile From field, and DASH will offer you a list of available users that match your entry.
> 2. Select the name from the list.
> 3. DASH will ask for confirmation before the profile is copied.
> 4. Confirm the copy action.
> 5. DASH will pre-populate all fields below the Copy Profile From line with the values from the selected existing user account.
> 6. You can modify any of the pre-populated fields as needed.

12. Select *Employed at Organization*.

> **NOTE**
> The organization drop-down menu is populated with all of the organizations that are assigned to you. If you need access to the user account from an organization that is not on the list, please contact IBC.

13. Select *Employed at Company*.

> **IMPORTANT**
> A company cannot be selected unless an organization is selected first.

Users

14. Select *Employed at Unit* (optional).

15. Select one or more *Assigned Organizations* for the new user account.

16. Select the checkboxes for all of the functions that the new user account should be able to access.

17. Assign the companies to the selected functions.

Users

NOTE

The companies can be assigned one by one from the list of available companies.

You can also assign all available companies by selecting the "All" checkbox.

The companies that are available in the list meet the following criteria:

- They belong to the organizations listed in the assigned organizations field.
- They have been assigned to you for the User Administration function.

18. If you have selected Drivers in the list of functions, an additional section of the user profile is displayed:

Driver Report – Number of Years Options	Default
☑ 25 Years – Insurance Company One	◎
☑ 10 Years – Insurance Company One	◎
☑ 6 Years – Insurance Company Two	◎

19. Select the checkboxes ☑ for the number-of-years options that should be available to the user.

NOTE

The selected options will be available in the user's number-of-years drop-down menu on the Drivers search screen.

20. Select the radio button ◉ for the default number-of-years option.

NOTE

The selected option will be the default value in the user's number-of-years drop-down menu on the Drivers search screen.

21. Click on the **Save** button.

NOTE

You can click on the **Cancel** button to return to the search screen without saving the user account.

22. DASH user account is created.

IMPORTANT

When the new user account is created, DASH sends an email invitation to the new user with instructions on how to access DASH.

The email invitation is sent to the user's work email address, as specified in the profile.

23. You can resend the invitation by clicking on the **Resend Invitation** button.

NOTE

After the new user has successfully logged in to DASH, the Resend Invitation button will no longer be available in the user's profile.

TROUBLESHOOTING

- **The Users function is not available in the menu:** Please contact your User Administrator.
- **I do not know which User ID to enter:** The User ID must match the Active Directory account created for the user. Please contact the person managing your Active Directory.
- **The Copy Profile From function is not listing the required user:** The list only includes the users that share the same work email domain as the account that is being created.

Users

- **The Employed at Organization drop-down menu is not showing the required organization:** The list only includes the organizations assigned to you for the Users function. If you need access to additional organizations, please contact your User Administrator.
- **The Employed at Company drop-down menu is not showing the required company:** The list only includes the companies assigned to you for the Users function. If you need access to additional companies, please contact your User Administrator.
- **The Employed at Unit drop-down menu is not showing the required unit:** The list only includes the units defined for the selected company; other values are not available. Contact your Company Administrator for more information.
- **The Assigned Organizations drop-down menu is not showing the required organization:** The list only includes the organizations assigned to you for the Users function. If you need access to additional organizations, please contact your User Administrator.
- **The Function list is not showing the required function:** The list only includes the functions assigned to you. If you need access to additional functions, please contact your User Administrator.
- **I cannot assign the required company to a function:** You can only assign companies that are assigned to you for the Users function and belong to one of the assigned organizations. Make sure that you have assigned the correct organizations to the user account. If you need access to additional companies, please contact your User Administrator.
- **I do not see the required number-of-years option in the list:** The list shows all number-of-years options defined for the companies assigned to the Driver Report function. Make sure that you have assigned the correct companies to the Driver Report function. If additional options are required, please contact your Company Administrator.

- **I cannot save the account:** Make sure that the following conditions are met:
  o The User ID field is populated.
  o The User ID domain is in the list of permitted domains in the profile of the company at which the user is employed.
  o The first and last name fields are populated.
  o The Work Email field is populated.
  o The Work Email domain is in the list of permitted domains in the profile of the company at which the user is employed.
  o The Employed at Organization field is populated.
  o The Employed at Company field is populated.
  o At least one function is selected.
  o For each function that requires company assignment, at least one company is assigned.
  o At least one of the companies assigned to the Drivers function has the number-of-years options defined in the company profile.
  o If the Drivers function is selected, at least one number-of-years option is selected.
  o One of the selected number-of-years options is marked as default.
- **The account is successfully saved, but the user did not receive the invitation email:** Make sure that you have entered the correct work email address. If the address is correct, resend the invitation by clicking on the Resend Invitation button. Ask the user to check their Spam folder.
- **The user cannot log in to the DASH Portal:** Make sure that the User ID specified in the user profile matches the User ID specified in the Active Directory.

7-4 Editing a User Profile

You can edit an existing user profile, when required. Follow these steps to modify an existing user profile:

1. Access the Users function and search for the user that you would like to edit (see Section 7-1 Searching for a User).
2. The Users search screen displays the list of results that match your search criteria:

Employed at Organization	All
Employed at Company	All
Employed at Unit	All
Status	Enabled
User ID	
Name	

Search   Reset   New User

User ID	Name	Organization	Company	Unit	Status	Profile
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **View** ▶ link next to the user account you would like to edit.
4. The User Profile screen is displayed for the selected user account:

User Profile   Disable Account

Account Type	IBC Account
User ID	
Name	
Work Email	
MFA Phone	
Copy Profile From	
Employed at Organization	All
Employed at Company	All
Employed at Unit	All
Assigned Organizations	12345 ⊗ 22345 ⊗

Functions	Companies
☑ Drivers	☐ All 001 ⊗ 002 ⊗
☐ Edit Mode	
☑ History	☑ All 001 ⊗ 002 ⊗ 003 ⊗ 004 ⊗ 005 ⊗ 006 ⊗ 007 ⊗ 008 ⊗ 009 ⊗ +
☑ 90 Days	☐ All 001 ⊗ 002 ⊗
☑ Company	☐ All 001 ⊗ 002 ⊗
☐ Users	
☐ Usage	
☐ Access	
☐ Corrections	

Driver Report – Number of Years Options	Default
☑ 25 Years – Insurance Company One	◎
☑ 10 Years – Insurance Company One	◎
☑ 6 Years – Insurance Company Two	◎

Save   Cancel   Resend Invitation   Delete Account

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

> **IMPORTANT**
> The User ID in an existing user account cannot be modified.

5. Modify the user's *Name* if needed:
   - The first name is mandatory.
   - The middle name is optional and can be left blank.
   - The last name is mandatory.

> **IMPORTANT**
> The Work Email in an existing user account cannot be modified.

6. Modify *MFA Phone* if needed.

> **IMPORTANT**
> The MFA Phone is used only for accounts that use IBC-issued credentials. For accounts that use company-issued credentials, this field is disabled.

7. Use the **Copy Profile From** field to copy the profile from another user account (optional).

> **IMPORTANT**
> The Copy Profile functionality allows you to pre-populate most of the fields in the new user's profile with values from an existing user account. To copy a profile, follow these steps:
> 1. Start typing the name of an existing user in the Copy Profile From field, and DASH will offer you a list of available users that match your entry.
> 2. Select the name from the list.
> 3. DASH will ask for confirmation before the profile is copied.
> 4. Confirm the copy action.
> 5. DASH will pre-populate all fields below the Copy Profile From line with the values from the selected existing user account.
> 6. You can modify any of the pre-populated fields as needed.

8. Modify *Employed at Organization* if needed.

> **NOTE**
> The organization drop-down menu is populated with all of the organizations that are assigned to you. If you need access to the user account from an organization that is not on the list, please contact IBC.

9. Modify *Employed at Company* if needed.

> **IMPORTANT**
> A company cannot be selected unless an organization is selected first.

> **NOTE**
> The company drop-down menu is populated with all of the companies that are assigned to you and belong to the selected organization. If you need access to the user account from a company that is not on the list, please contact IBC.

10. Modify *Employed at Unit* if needed (optional).

> **IMPORTANT**
> A unit cannot be selected unless a company is selected first.

> **NOTE**
> The unit drop-down menu is populated with all of the units that belong to the selected company. If the company does not have any units defined, the drop-down menu is empty.

11. Modify the *Assigned Organizations* selection if needed.

> **NOTE**
> The list of organizations that you can select from is based on your user profile. You will not be able to assign organizations that have not been assigned to you. If you need to assign an organization that is not on the list, please contact IBC.

12. Modify the function selection if needed.

> **NOTE**
> The list of functions that you can select from is based on your user profile. You will not be able to assign functions that have not been assigned to you. If you need to assign a function that is not available in the list, please contact IBC.

13. Modify the company assignment for the selected functions. The assigned companies will be used in DASH functions as follows:

> **NOTE**
> **Drivers function**: User will be able to request and review driver reports. User will have access to the number-of-years options from the assigned companies.
> **Edit Mode function**: User will be allowed to correct data submitted by the assigned companies. Please note that this function can only be available to users employed at insurance companies.
> **History function**: User will be allowed to review past reports generated by the users employed at the assigned companies.
> **90 Days function**: User will be allowed to review changed reports generated by the users employed at the assigned companies.
> **Vehicles function**: User will be allowed to request and review vehicle reports.
> **Company function**: User will be allowed to manage the company profile of the assigned companies.
> **Users function**: User will be allowed to perform user administration for the users employed at the assigned companies.
> **Usage function**: User will be allowed to review usage for the users employed at the assigned companies.
> **Access function**: User will be allowed to review access for the users employed at the assigned companies.
> **Corrections function**: User will be allowed to review past corrections performed by the users employed at the assigned companies. Please note that this function can only be available to users employed at insurance companies.
> **Clients function**: User will be allowed to manage the catalogue of DASH clients. Please note that this function can only be available to IBC employees.

Users

NOTE

The companies can be assigned one by one from the list of available companies.

You can also assign all available companies by selecting the "All" checkbox.

The companies that are available in the list meet the following criteria:

- Companies that belong to the organizations listed in the assigned organizations field
- Companies that have been assigned to you for the User Administration function.

14. If you have selected Drivers in the list of functions, an additional section of the user profile is displayed:

Driver Report – Number of Years Options	Default
☑ 25 Years – Insurance Company One	◎
☑ 10 Years – Insurance Company One	◎
☑ 6 Years – Insurance Company Two	◎

15. Modify the selection of the number-of-years options, if needed.

NOTE

The selected options will be available in the user's number-of-years drop-down menu on the Driver Report search screen.

16. Modify the selection of the default number-of-years option, if needed.

NOTE

The selected option will be the default value in the user's number-of-years drop-down menu on the Driver Report search screen.

17. Click on the [**Save**] button.

NOTE

You can click on the [**Cancel**] button to return to the search screen without saving the user account.

18. The modified DASH user account is saved.

TROUBLESHOOTING

- **The User Administration function is not available in the menu:** Please contact your User Administrator.
- **The Copy Profile From is not listing the required user:** The list only includes the users who share the same work email domain as the account that is being created.
- **The Employed at Organization drop-down menu is not showing the required organization:** The list only includes the organizations assigned to you for the User Administration function. If you need access to additional organizations, please contact your User Administrator.
- **The Employed at Company drop-down menu is not showing the required company:** The list only includes the companies assigned to you for the User Administration function. If you need access to additional companies, please contact your User Administrator.
- **The Employed at Unit drop-down menu is not showing the required unit:** The list only includes the units defined for the selected company, and other values are not available. Contact your Company Administrator for more information.
- **The Assigned Organizations drop-down menu is not showing the required organization:** The list only includes the organizations assigned to you for the User Administration function. If you need access to additional organizations, please contact your User Administrator.
- **The Function list is not showing the required function:** The list only includes the functions assigned to you. If you need access to additional functions, please contact your User Administrator.

- **I cannot assign the required company to a function:** You can only assign companies that are assigned to you for the User Administration function and that belong to one of the assigned organizations. Make sure you have assigned the correct organizations to the user account. If you need access to additional companies, please contact your User Administrator.
- **I do not see the required number-of-years option in the list:** The list shows all of the number-of-years options defined for the companies assigned to the Driver Report function. Make sure you have assigned the correct companies to the Driver Report function. If additional options are required, please contact your Company Administrator.
- **I cannot save the account:** Make sure that the following conditions are met:
    - The first name and last name fields are populated
    - The work email field is populated
    - The work email domain is in the list of permitted domains in the profile of the company at which the user is employed
    - The Employed at Organization field is populated
    - The Employed at Company field is populated
    - At least one function is selected
    - For each function that requires company assignment, at least one company is assigned
    - At least one of the companies assigned to the Driver Report function has the number-of-years options defined in the Company Profile
    - If the Driver Report function is selected, at least one number-of-years option is selected
    - One of the selected number-of-years options is marked as default.

7-5 Disabling a User Account

You can disable an existing user account when required. Follow these steps to disable a user account:

1. Access the Users function and search for the user account that you would like to disable (see Section 7-1 Searching for a User).
2. The Users search screen displays the list of results that match your search criteria:

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **View ▶** link next to the user account you would like to disable.

NOTE
You can only disable accounts in Enabled status.

4. The User Profile screen is displayed for the selected user account:

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

Users

5. Click on the **Disable Account** button.
6. DASH will ask you to confirm the disable action.
7. Confirm the disable action.
8. The user account is disabled.

IMPORTANT
Users with disabled accounts cannot log in to the DASH Portal.

NOTE
Disabled accounts can be enabled again (see Section 7-6 Enabling User Account).

TROUBLESHOOTING

- **The Users function is not available in the menu:** Please contact your User Administrator.
- **The Disable Account button is not available:** Make sure that the status of the selected user account is listed as Enabled.

7-6 Enabling a User Account

You can enable an existing user account when required. Follow these steps to enable a user account:

1. Access the Users function and search for the user account that you would like to enable (see Section 7-1 Searching for a User).
2. The Users search screen displays the list of results that match your search criteria:

NOTE
The above image is for illustration purposes only. The values displayed do not represent real data.

3. Click on the **View ▶** link next to the user account you would like to enable.

NOTE
You can only enable accounts in Disabled status.

4. The User Profile screen is displayed for the selected user account:

NOTE
The above image is for illustration purposes only. The values displayed do not represent real data.

5. Click on the **Enable Account** button.
6. DASH will ask you to confirm the enable action.
7. Confirm the enable action.
8. The user account is enabled.

> **IMPORTANT**
> After enabling the user account, you must further modify the user profile to specify the functions and companies that the account can access.

9. Use **Copy Profile From** field to copy the profile from another user account (optional).

> **IMPORTANT**
> The Copy Profile functionality allows you to pre-populate most of the fields in the new user's profile with values from an existing user account.
> To copy a profile, follow these steps:
> 7. Start typing the name of an existing user in the Copy Profile From field, and DASH will offer you a list of available users that match your entry.
> 8. Select the name from the list.
> 9. DASH will ask for confirmation before the profile is copied.
> 10. Confirm the copy action.
> 11. DASH will pre-populate all fields below the Copy Profile From line with the values from the selected existing user account.
> 12. You can modify any of the pre-populated fields as needed.

10. Select *Employed at Organization*.

> **NOTE**
> The organization drop-down menu is populated with all of the organizations that are assigned to you. If you need access to the user account from an organization that is not on the list, please contact IBC.

11. Select *Employed at Company*.

> **IMPORTANT**
> A company cannot be selected unless an organization is selected first.

> **NOTE**
> The company drop-down menu is populated with all of the companies that are assigned to you and belong to the selected organization. If you need access to a user account from a company that is not on the list, please contact IBC.

12. Select *Employed at Unit* (optional).

> **IMPORTANT**
> A unit cannot be selected unless a company is selected first.

> **NOTE**
> The unit drop-down menu is populated with all of the units that belong to the selected company. If the company does not have any units defined, the drop-down menu will be empty.

13. Select one or more *Assigned Organizations* for the new user account.

> **NOTE**
> The list of organizations that you can select is based on your user profile. You will not be able to assign organizations that have not been assigned to you. If you need to assign an organization that is not available in the list, please contact IBC.

14. Select the checkboxes for all of the functions that the new user account should be able to access.

Users

NOTE
The list of functions that you can select from is based on your user profile. You will not be able to assign functions that have not been assigned to you. If you need to assign a function that is not in the list, please contact IBC.

15. Assign the companies to the selected functions. The assigned companies will be used in DASH functions as follows:
    - **Drivers function**: User will have access to the number-of-years options from the assigned companies.
    - **Edit Mode function**: User will be allowed to correct data submitted by the assigned companies.
    - **History function**: User will be allowed to review past reports generated by the users employed at the assigned companies.
    - **90 Days function**: User will be allowed to review changed reports generated by the users employed at the assigned companies.
    - **Company function**: User will be allowed to manage the company profile of the assigned companies.
    - **Users function**: User will be allowed to perform user administration for the users employed at the assigned companies.
    - **Usage function**: User will be allowed to review usage for the users employed at the assigned companies.
    - **Access function**: User will be allowed to review access for the users employed at the assigned companies.
    - **Corrections function**: User will be allowed to review past corrections performed by the users employed at the assigned companies.

NOTE
The companies can be assigned one by one from the list of available companies.
You can also assign all available companies by selecting the "All" checkbox.
The companies that are available in the list meet the following criteria:
- They belong to the organizations listed in the assigned organizations field.
- They have been assigned to you for the User Administration function.

16. If you have selected Drivers in the list of functions, an additional section of the user profile is displayed:

Driver Report – Number of Years Options	Default
☑ 25 Years – Insurance Company One	◎
☑ 10 Years – Insurance Company One	◎
☑ 6 Years – Insurance Company Two	◎

17. Select the checkboxes ☑ for the number-of-years options that should be available to the user.

NOTE
The selected options will be available in the user's number-of-years drop-down menu on the Drivers search screen.

18. Select the radio button ⊙ for the default number-of-years option.

NOTE
The selected option will be the default value in the user's number-of-years drop-down menu on the Drivers search screen.

Users

19. Click on the **Save** button.

> **NOTE**
> You can click on the **Cancel** button to return to the search screen without saving the user account.

20. The DASH user account is enabled and saved.

TROUBLESHOOTING

- **The Users function is not available in the menu:** Please contact your User Administrator.
- **The Enable Account button is not available:** Make sure that the selected user account is in Disabled status.
- **The Employed at Organization drop-down menu is not showing the required organization:** The list only includes the organizations assigned to you for the Users function. If you need access to additional organizations, please contact your User Administrator.
- **The Employed at Company drop-down menu is not showing the required company:** The list only includes the companies assigned to you for the Users function. If you need access to additional companies, please contact your User Administrator.
- **The Employed at Unit drop-down menu is not showing the required unit:** The list only includes the units defined for the selected company, and other values are not available. Contact your Company Administrator for more information.
- **The Assigned Organizations drop-down menu is not showing the required organization:** The list only includes the organizations assigned to you for the Users function. If you need access to additional organizations, please contact your User Administrator.
- **The Function list is not showing the required function:** The list only includes the functions assigned to you. If you need access to additional functions, please contact your User Administrator.
- **I cannot assign the required company to a function:** You can only assign companies that are assigned to you for the Users function and that belong to one of the assigned organizations. Make sure you have assigned the correct organizations to the user account. If you need access to additional companies, please contact your User Administrator.

Users

- **I do not see the required number-of-years option in the list:** The list shows all of the number-of-years options defined for the companies assigned to the Driver Report function. Make sure that you have assigned the correct companies to the Driver Report function. If additional options are required, please contact your Company Administrator.
- **I cannot save the account:** Make sure that the following conditions are met:
  - The first name and last name fields are populated
  - The work email field is populated
  - The work email domain is in the list of permitted domains in the profile of the company at which the user is employed
  - The Employed at Organization field is populated
  - The Employed at Company field is populated
  - At least one function is selected
  - For each function that requires company assignment, at least one company is assigned
  - At least one of the companies assigned to the Driver Report function has the number-of-years options defined in the Company Profile
  - If the Driver Report function is selected, at least one number-of-years option is selected
  - One of the selected number-of-years options is marked as default.

7-7 Deleting a User Account

You can delete an existing user account when required. Follow these steps to delete a user account:

1. Access the Users function and search for the user account that you would like to delete (see Section 7-1 Searching for a User).
2. The Users search screen displays the list of results that match your search criteria:

Employed at Organization	All					
Employed at Company	All					
Employed at Unit	All					
Status	Enabled					
User ID						
Name						

Search   Reset   New User

User ID	Name	Organization	Company	Unit	Status	Profile
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶
jsmith@company1.com	John Smith	Insurance Parent Organization	Insurance Company One	Underwriting	Enabled	View ▶

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the **View** ▶ link next to the user account you would like to disable.
4. The User Profile screen is displayed for the selected user account:

User Profile   Disable Account

Account Type	IBC Account
User ID	
Name	
Work Email	
MFA Phone	
Copy Profile From	
Employed at Organization	All
Employed at Company	All
Employed at Unit	All
Assigned Organizations	12345 ⓧ 22345 ⓧ

Functions	Companies
☑ Drivers	☐ All 001 ⓧ 002 ⓧ
☐ Edit Mode	
☑ History	☑ All 001 ⓧ 002 ⓧ 003 ⓧ 004 ⓧ 005 ⓧ 006 ⓧ 007 ⓧ 008 ⓧ 009 ⓧ +
☑ 90 Days	☐ All 001 ⓧ 002 ⓧ
☑ Company	☐ All 001 ⓧ 002 ⓧ
☐ Users	
☐ Usage	
☐ Access	
☐ Corrections	

Driver Report – Number of Years Options	Default
☑ 25 Years – Insurance Company One	◉
☑ 10 Years – Insurance Company One	◉
☑ 6 Years – Insurance Company Two	◉

Save   Cancel   Resend Invitation   Delete Account

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

5. Click on the **Delete Account** button.

> **IMPORTANT**
> The **Delete Account** button is displayed only if the user never logged in to DASH.

6. DASH will ask you to confirm the delete action.
7. Confirm the delete action.
8. The user account is deleted.

> **IMPORTANT**
> Users with deleted accounts cannot log in to the DASH Portal.

> **NOTE**
> Deleted accounts cannot be restored. However, a new account with the same User ID can be created.

> **TROUBLESHOOTING**
>
> - **The Users function is not available in the menu:** Please contact your User Administrator.
> - **The Delete Account button is not available:** If the user already successfully logged in to DASH, then the account cannot be deleted. However, you can disable the user account (see 7-5 Disabling a User Account).

8 Usage

The Usage function allows you to track how many driver reports were generated within your assigned companies. The usage can be tracked for a company, unit, and individual users, and can be based on a date range.

The Usage functionality includes exporting the report into a CSV file.

8-1 Searching for Usage Data

DASH keeps a record of all driver reports that have been retrieved in the past. The Usage function allows you to find out how many driver reports were retrieved by a specific company, unit or a user within a defined date range.

> **IMPORTANT**
> You can only view the usage data for the companies that are assigned to you. To get access to a specific company, please contact your User Administrator

Follow these steps to generate a usage report:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Usage** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Usage (see Section 1-4 Navigation).

3. The Usage screen is presented:

Organization	All ▾
Company	All ▾
Unit	All ▾
User ID	
User Name	smith
Date Range	From YYYY-MM-DD ▦ To YYYY-MM-DD ▦

Search   **Reset**   **Export**

4. Select the *Organization* where the driver reports requestor(s) are employed.

> **NOTE**
> The organization drop-down menu is populated with all organizations that are assigned to you. If you need access to an organization that is not on the list, please contact your User Administrator.

> **NOTE**
> The organization selection is optional. You can leave the organization un-selected, in which case your search will return the results regardless of the organization.

5. Select the *Company* where the driver reports requestor(s) are employed.

> **IMPORTANT**
> A company cannot be selected unless an organization is selected first.

> **NOTE**
> The company drop-down menu is populated with all companies that are assigned to you, and that belong to the selected organization. If you need access to a company that is not on the list, please contact your User Administrator.

> **NOTE**
> The company selection is optional. You can leave the company un-selected, in which case your search will return the results regardless of the company.

Usage

6. Select the *Unit* where the driver reports requestor(s) are employed.

> **IMPORTANT**
> A unit cannot be selected unless a company is selected first.

> **NOTE**
> The unit drop-down menu is populated with all of the units that belong to the selected company. If the company does not have any units defined, the drop-down menu will be empty.

> **NOTE**
> The unit selection is optional. You can leave the unit un-selected, in which case your search will return the results regardless of the unit.

7. Enter the *User ID* of the user who requested the driver reports.

> **NOTE**
> The User ID is optional. You can leave the User ID blank, in which case your search will return the results regardless of the User ID.

> **NOTE**
> Partial search is allowed. This means that the result will be identified even if it is not the exact match but contains the value entered in the search field.

8. Enter the *User Name* of the user who requested the driver reports.

> **NOTE**
> The name is optional. You can leave the name blank, in which case your search will return the results regardless of the name.

> **NOTE**
> Partial search is allowed. This means that the result will be identified even if it is not the exact match but contains the value entered in the search field.

9. Enter the *Date Range* in which the Driver Reports were requested.

> **NOTE**
> By default, the date range is set to the current day.

> **NOTE**
> You can populate the dates by entering the date in YYYY-MM-DD format or by selecting a date from the calendar.

> **NOTE**
> The date range is optional. You can enter just one of the dates or leave both dates empty, in which case your search will return the results regardless of the date.

10. Click on the **Search** button to view the list of results matching your search criteria.

> **NOTE**
> You can click on the **Reset** button to clear all the fields in the search criteria.

Usage

11. The DASH Portal will display the usage report based on your search criteria.

Organization	All
Company	All
Unit	All
User ID	
User Name	smith
Date Range	From YYYY-MM-DD — To YYYY-MM-DD

Search   Reset   Export

Organization	Company	Unit	User ID	Name	Number of Reports
Parent Organization ABC	Child Company One	Unit X	jsmith@companyone.com	John Smith	12345

NOTE
The above image is for illustration purposes only. The values displayed in the sample do not represent real data.

NOTE
You can sort the result list by clicking on the header of the column that you would like to sort. Clicking repeatedly on the same header will alternate the column sort between ascending and descending order.

The result list displays the following columns:

- **Organization** – the organization where the report requestor is employed
- **Company** – the company where the report requestor is employed
- **Unit** – the unit where the report requestor is employed
- **User ID** – the user ID of the report requestor
- **User Name** – the name of the report requestor

- **Number of Requests** – the total number of driver reports generated for the report requestor within the specified date range.

TROUBLESHOOTING

- **The Usage function is not available in the menu:** Please contact your User Administrator.
- **The required organization is not showing in the drop-down list:** The list only includes the organizations assigned to you for the Usage function. If you need access to additional organizations, please contact your User Administrator.
- **The required company is not showing in the drop-down list:** The list only includes the companies assigned to you for the Usage function. If you need access to additional companies, please contact your User Administrator.
- **The required unit is not showing in the drop-down list:** The list only includes the units defined for the selected company; other values are not available. Contact your Company Administrator for more information.
- **Zero results found:** Please modify your search criteria – consider removing some of the search field values to relax the search criteria.

8-2 Exporting a Usage Report

After you perform a successful search for usage data (see Section 8-1 Searching for Usage Data), the DASH Portal will display the usage report that matches your search criteria:

Organization	All
Company	All
Unit	All
User ID	
User Name	smith
Date Range	From YYYY-MM-DD To YYYY-MM-DD

Search   **Reset**   **Export**

Organization	Company	Unit	User ID	Name	Number of Reports
Parent Organization ABC	Child Company One	Unit X	jsmith@companyone.com	John Smith	12345

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

1. Click on the **Export** button to export the list to a CSV file.
2. The DASH Portal will export the data and download the CSV file to your computer.

NOTE
The CSV file will contain all the results that match your search criteria.

9 Access

The Access function allows you to review the access rights of user accounts. Access rights can be reviewed as of a selected date, which means that the access report will show the list of DASH functions that were assigned to the user on that particular date.

The Access function also provides an option to review the history of a specific user account, including the details of when the account was created and when each of the DASH functions was assigned.

The Access functionality includes exporting the access report list into a CSV file and saving the history of a particular user account access to a PDF file.

9-1 Searching for Access Data

DASH keeps a record of all user accounts, and their access to DASH functions. The Access function allows you to find out which DASH functions were assigned to which user account(s) on a specified date.

> **IMPORTANT**
> You can only view an access report for users employed at the companies that are assigned to you. To get access to a specific company, please contact your User Administrator.

Follow these steps to generate an access report:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Access** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Access (see Section 1-4 Navigation).

3. The Access screen is presented:

Organization	All
Company	All
User ID	
User Name	
Status	Active
Function	All
As-Of Date	YYYY-MM-DD

Search **Reset**   **Export**

4. Select the *Organization* where the user(s) are employed.

> **NOTE**
> The organization drop-down menu is populated with all of the organizations that are assigned to you. If you need access to an organization that is not on the list, please contact your User Administrator.

> **NOTE**
> The organization selection is optional. You can leave the organization un-selected, in which case your search will return the results regardless of the organization.

5. Select the *Company* where the user(s) are employed.

> **NOTE**
> The company drop-down menu is populated with all companies that are assigned to you, and that belong to the selected organization. If you need access to a company that is not on the list, please contact your User Administrator.

> **NOTE**
> The company selection is optional. You can leave the company un-selected, in which case your search will return the results regardless of the company.

6. Enter the *User ID* of the account you are looking for.

> **NOTE**
> The User ID is optional. You can leave the User ID blank, in which case your search will return the results regardless of the User ID.

Access

NOTE
A partial search is allowed. This means that the result will be identified even if it is not the exact match, but contains the value entered in the search field.

NOTE
You can populate the field by entering the date in YYYY-MM-DD format or by selecting a date from the calendar.

7. Enter the *Name* of the user you are looking for.

NOTE
The name is optional. You can leave the name blank, in which case your search will return the results regardless of the name.

NOTE
A partial search is allowed. This means that the result will be identified even if it is not the exact match, but contains the value entered in the search field.

11. Click on the **Search** button to view the list of results matching your search criteria.

NOTE
You can click on the **Reset** button to clear all the fields in the search criteria.

8. Select the *Status* of the user account.

NOTE
You can search for accounts that are enabled, accounts that are disabled or all accounts regardless of their status.

12. The DASH Portal will display the access report based on your search criteria.

Organization	All
Company	All
User ID	
User Name	
Status	Active
Function	All
As-Of Date	YYYY-MM-DD

Search **Reset** **Export**

Organization	Company	User ID	Name	Status	Created	Last Login	Functions	History
Parent Organ+	Company O+	jsmith@co+	John Smith	Active	2022-09-01	2022-11-11	Driver Report; Vehicle Report; Report Hist+	View ▶

9. Select the *Function* that the user account has access to.

NOTE
The function selection is optional. You can leave the field blank, in which case your search will return the results regardless of the assigned functions.

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

10. Enter the *As-Of Date* for which the access report should be displayed.

Access

The result list displays the following columns:

- **Organization** – the organization where the user is employed
- **Company** – the company where the user is employed
- **User ID** – the user ID of the user
- **User Name** – the name of the user
- **Status** – the status of the user account as of the specified date
- **Created** – the date when the user account was created
- **Last Login** – the last date when the user successfully logged in to DASH
- **Functions** – the list of functions that were assigned to the user account as of the specified date
- **View ▶** – link that allows you to view the history of the user's access.

9-2 Exporting an Access Report

After you perform a successful search for access data (see Section 9-1 Searching for Access Data), the DASH Portal will display the access report that matches your search criteria.

1. Click on the **Export** button to export the list to a CSV file.
2. The DASH Portal will export the data and download the CSV file to your computer.

TROUBLESHOOTING

- **I cannot find the downloaded CSV file:** Please check your browser settings for the location of downloads. The CSV file name will have the format "Access Report YYYY-MM-DD.csv," where YYYY-MM-DD represents the date when the Access Report was exported.
- **I cannot open the CSV file:** Please check the default program that your computer uses to open CSV files. Typically, CSV files can be opened with Excel or a similar program.

9-3 Viewing User Access History

After you perform a successful search for access data (see Section 9-1 Searching for Access Data), the DASH Portal will display the access report that matches your search criteria:

Organization	All ▼
Company	All ▼
User ID	
User Name	
Status	Active ▼
Function	All ▼
As-Of Date	YYYY-MM-DD 📅

Search   Reset   **Export**

Organization	Company	User ID	Name	Status	Created	Last Login	Functions	History
Parent Organ+	Company O+	jsmith@co+	John Smith	Active	2022-09-01	2022-11-11	Driver Report; Vehicle Report; Report Hist+	View ▶

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

1. Click on the **View** ▶ link to view the access history of a specific user account.
2. The DASH Portal will display the Access History screen:

Open PDF   Back

User ID: **jsmith@company1.ca**
Name: **John Smith**
Organization: **12345 Parent Organization**
Company: **678 Company One**
Status As Of 2022-11-01: **Active**
Account Creation Date: **2022-09-01**
Last Login Date: **2022-11-11**
Access As Of 2022-11-01: **Driver Report; Vehicle Report; Report History; 90 Day Report; User Administration; Company Profile;**

Change Date	Change Administrator	Change Description
2022-09-01	admin@companyone.ca	Account Created
2022-09-01	admin@companyone.ca	Driver Report – Access Granted
2022-09-01	admin@companyone.ca	Vehicle Report – Access Granted

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

3. The screen displays the following information:
   - **User ID** – the user ID of the user
   - **Name** – the name of the user
   - **Organization** – the organization where the user is employed
   - **Company** – the company where the user is employed
   - **Status** – the status of the user account as of the specified date
   - **Account Creation Date** – the date when the user account was created
   - **Last Login Date** – the last date when the user successfully logged in to DASH
   - **Access As Of [Date]** – the list of functions that were assigned to the user account as of the specified date
   - **Change History** – the table that contains the list of changes that pertain to the user account. The following columns are displayed:
     o **Change Date** – the date when the change occurred

Access

- o **Change Administrator** – the User ID of the administrator who performed the change
- o **Change Description** – the description of the change. This can include any the of the following events:
    - Account Created
    - Account Disabled
    - Account Enabled
    - Function – Access Granted
    - Function – Access Revoked.

You can click on the `Back` button to return to the Access Report screen.

9-4 Saving User Access History

After you perform a successful search for access data (see Section 9-1 Searching for Access Data), the DASH Portal will display the access report that matches your search criteria:

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

1. Click on the **View ▶** link to view the access history of a specific user account.
2. The DASH Portal will display the Access History screen.

NOTE
The image above is for illustration purposes only. The values displayed in the sample do not represent real data.

3. Click on the   **Open PDF**   button to open the access history as a PDF document.

NOTE
The PDF document will open in a separate browser tab or window. You may need to allow pop-ups from the DASH Portal in your browser to view the PDF document.

4. You can use your browser controls to print the PDF document.
5. You can click on the   **Back**   button to return to the Access Report screen.

10 Corrections

The DASH Portal allows authorized users to perform corrections to the data displayed in the Driver Report. DASH keeps track of all corrections made through the DASH Portal.

The Corrections function allows you to review the corrections made through the DASH Portal within your assigned companies.

The Corrections function also includes a functionality of exporting the list of corrections into a CSV file.

10-1 Searching for Past Corrections

DASH keeps record of all data corrections that have been made through the DASH Portal.

The Corrections function allows you to find the past corrections that were made by a specific company within a defined date range.

Follow these steps to generate a corrections report:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the `Corrections` option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Corrections (see Section 1-4 Navigation).

3. The Corrections Report screen is presented:

Organization	All
Company	All
Correction Date	From YYYY-MM-DD To YYYY-MM-DD

Search   **Reset**   **Export**

4. Select the *Organization* for which the corrections were made.

> **NOTE**
> The organization drop-down menu is populated with all of the organizations that are assigned to you. If you need access to an organization that is not on the list, please contact your User Administrator.

> **NOTE**
> The organization selection is optional. You can leave the organization un-selected, in which case your search will return the results regardless of the organization.

5. Select the *Company* for which the corrections were made.

> **NOTE**
> The company drop-down menu is populated with all companies that are assigned to you, and that belong to the selected organization. If you need access to a company that is not on the list, please contact your User Administrator.

> **NOTE**
> The company selection is optional. You can leave the company un-selected, in which case your search will return the results regardless of the company.

6. Enter the *Correction Date* range in which the corrections were made.

> **NOTE**
> You can populate the dates by entering the date in YYYY-MM-DD format, or by selecting a date from the calendar .

Corrections

7. Click on the **Search** button to view the list of results matching your search criteria.

8. The DASH Portal will display the Corrections Report based on your search criteria:

Organization	All
Company	All
Correction Date	From YYYY-MM-DD	To YYYY-MM-DD

Search   Reset   Export

3 results found

Company	Corr DT	User	Corr Type	DLN	Policy ID	Effective DT	Claim ID	Accident DT	Old Value	New Value
123 Insu...	2023-03-25	jsmith	Driver Name	S1234-2...	P12345	2022-01-01			Bob Brown	Bob Black
123 Insu...	2023-03-25	jsmith	Policy Status	S1234-2...	P12345	2022-01-01			Active	Cancelled at In...
123 Insu...	2023-03-25	jsmith	At Fault %	S1234-2...	P12345	2022-01-01	C2345	2022-06-21	100%	0%

The result list displays the following columns:

- **Company** – the company for which the correction was made.
- **Correction Date** – the date when the correction was made.
- **User** – the name of the user who performed the correction.
- **Correction Type** – the type of the correction. This column indicates the field that was corrected.
- **DLN** – the driver's license number to which the correction applies.
- **Policy ID** – the policy ID to which the correction applies.
- **Effective Date** – the policy effective date to which the correction applies.
- **Claim ID** – the claim ID to which the correction applies. This column is populated only if one of the claim fields was corrected.
- **Accident Date** – the accident date to which the correction applies. This column is populated only if one of the claim fields was corrected.
- **Old Value** – the old value of the corrected field.
- **New Value** – the new value of the corrected field.

Corrections

TROUBLESHOOTING

- **The Corrections function is not available in the menu:** Please contact your User Administrator.
- **The required organization is not showing in the drop-down menu:** The list only includes the organizations assigned to you for the Corrections function. If you need access to additional organizations, please contact your User Administrator.
- **The required company is not showing in the drop-down menu:** The list only includes the companies assigned to you for the Corrections function. If you need access to additional companies, please contact your User Administrator.
- **Zero results found:** Please modify your search criteria – consider removing some of the search field values to relax the search criteria.

10-2 Exporting a Corrections Report

After you perform a successful search for corrections (see Section 10-1 Searching for Corrections), the DASH Portal will display the corrections report that matches your search criteria.

Organization	All									
Company	All									
Correction Date	From YYYY-MM-DD	To YYYY-MM-DD								

Search   **Reset**   **Export**

3 results found

Company	Corr DT	User	Corr Type	DLN	Policy ID	Effective DT	Claim ID	Accident DT	Old Value	New Value
123 Insu...	2023-03-25	jsmith	Driver Name	S1234-2...	P12345	2022-01-01			Bob Brown	Bob Black
123 Insu...	2023-03-25	jsmith	Policy Status	S1234-2...	P12345	2022-01-01			Active	Cancelled at In...
123 Insu...	2023-03-25	jsmith	At Fault %	S1234-2...	P12345	2022-01-01	C2345	2022-06-21	100%	0%

NOTE
The above image above is for illustration purposes only. The values displayed in the sample do not represent real data.

1. Click on the **Export** button to export the list to a CSV file.
2. The DASH Portal will export the data and download the CSV file to your computer.

NOTE
The CSV file will contain all the results that match your search criteria.

11 Clients

The DASH Portal is available to users from insurance companies, as well as users from other types of companies, including insurance brokerages and commercial third parties.

The Clients function allows you to review and manage the details of all companies that have access to DASH, except for insurance companies, which are managed separately outside of the DASH Portal.

Clients

11-1 Viewing DASH Clients

The Clients function allows you to view the full list of all companies that have access to DASH, with the exception of insurance companies.

> **NOTE**
> The catalogue of insurance companies is managed through a process outside of the DASH Portal.

> **IMPORTANT**
> The Clients function is available only to authorized IBC users.

Follow these steps to view the list of DASH clients:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Clients** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Clients (see Section 1-4 Navigation).

3. The Clients screen is presented:

Client Name	Start typing to search				New Client
Client ID	**Client Name**	**Client Type**			
C001	Brokerage ABC	Brokerage		Delete ▶	Details ▶
C002	Facility Association	Other			Details ▶
C003	Brokerage DEF	Brokerage			Details ▶
C004	Applied	Commercial Third Party		Delete ▶	Details ▶
IBC	Insurance Bureau of Canada	IBC			Details ▶
C005	Commercial XYZ	Commercial Third Party			Details ▶

The list displays the following columns:

- **Client ID –** the system generated ID of the client.
- **Client Name** – the English name of the client.
- **Client Type** – the type of client, which can be one of the following values:
    - Brokerage
    - IBC
    - Commercial third party
    - Other
- **Delete ▶** – a link allowing you to delete a DASH client (see Section 11-4 Deleting a DASH client)
- **Details ▶** – a link allowing you to view the details of a DASH client.

4. Type the name of the client you are looking for in the search box. The result table will be filtered as you type.
5. Click on the **Details ▶** link to view the details of a selected client.
6. The DASH Clients details screen is displayed:

Client Type	Brokerage ▾		
Client Name English	Brokerage ABC		
Client Name French	Brokerage ABC French		
Sponsoring Organization		**Sponsoring Company**	
Organization A		Company A1	Delete ▶
Organization A		Company A2	Delete ▶
Organization A		Company A3	Delete ▶
Organization B		Company B1	Delete ▶
Organization B		Company B2	Delete ▶
Add Sponsor ▶			
Save	Cancel		

Clients

The screen displays the following fields:

- **Client Type** – the type of client, which can be one of the following values:
    - Brokerage
    - IBC
    - Commercial third party
    - Other
- **Client Name English** – the English name of the client
- **Client Name French** – the French name of the client
- **List of Sponsors** – the table listing all sponsors of the client. The table includes the following information:
    - **Sponsoring Organization** – the insurance organization sponsoring the client
    - **Sponsoring Company** – the insurance company sponsoring the client
    - **Delete** – link that allows you to delete a sponsor
    - **Add Sponsor** – link that allows you to add a sponsor.

> **NOTE**
> The list of sponsors is displayed only for brokerages, since other client types do not require sponsors.

> **TROUBLESHOOTING**
>
> - **The Clients function is not available in the menu:** Please contact your User Administrator.

Clients

11-2 Adding a New Client

The Clients function allows you to add a new client to DASH when needed.

> **IMPORTANT**
> The Clients function is available only to authorized IBC users.

Follow these steps to add a new DASH client:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Clients** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Clients (see Section 1-4 Navigation).

3. The Clients screen is presented:

Client ID	Client Name	Client Type		
C001	Brokerage ABC	Brokerage	Delete ▶	Details ▶
C002	Facility Association	Other		Details ▶
C003	Brokerage DEF	Brokerage		Details ▶
C004	Applied	Commercial Third Party	Delete ▶	Details ▶
IBC	Insurance Bureau of Canada	IBC		Details ▶
C005	Commercial XYZ	Commercial Third Party		Details ▶

Client Name: Start typing to search   **New Client**

4. Click on the **New Client** button to add a new client.
5. The DASH Clients details screen is displayed.

Client Type: Brokerage
Client Name English:
Client Name French:

Sponsoring Organization	Sponsoring Company
Add Sponsor ▶	

Save **Cancel**

6. Select the *Client Type*.
7. Enter *Client Name English*.
8. Enter *Client Name French*.
9. If you have selected a brokerage as the client type, the screen will display the *List of Sponsors* table.

> **NOTE**
> The List of Sponsors table is displayed only for brokerages, since other client types do not require sponsors.

10. Click on the **Add Sponsor ▶** link to add a sponsor for the brokerage (optional);
    a. The Add Sponsor dialogue is presented:

Add Sponsor

Organization ▼
Company ▼

Cancel **Save**

Clients

b. Select the sponsoring *Insurance Organization*.

c. Select the sponsoring *Insurance Company*.

d. Click on the **Save** button.

> **NOTE**
> You can click on the **Cancel** button to close the dialogue without adding a sponsor.

e. The sponsor is added to the List of Sponsors.

Client Type	Brokerage
Client Name English	Brokerage ABC
Client Name French	Brokerage ABC French

Sponsoring Organization	Sponsoring Company	
Organization A	Company A1	Delete ▶
Add Sponsor ▶		

Save **Cancel**

11. Click on the **Save** button to save the new client.

> **NOTE**
> You can click on the **Cancel** button to return to the previous screen without saving the new client.

11-3 Editing a Client

The DASH Clients function allows you to edit an existing DASH client when needed.

> **IMPORTANT**
> The DASH clients function is available only to authorized IBC users.

Follow these steps to edit an existing DASH client:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Clients** option.

> **NOTE**
> Alternatively, you can use the landing page tiles to navigate to Clients (see Section 1-4 Navigation).

3. The Clients screen is presented:

Client ID	Client Name	Client Type		
C001	Brokerage ABC	Brokerage	Delete ▶	Details ▶
C002	Facility Association	Other		Details ▶
C003	Brokerage DEF	Brokerage		Details ▶
C004	Applied	Commercial Third Party	Delete ▶	Details ▶
IBC	Insurance Bureau of Canada	IBC		Details ▶
C005	Commercial XYZ	Commercial Third Party		Details ▶

Client Name: Start typing to search   **New Client**

4. Click on the **Details ▶** link of the client you want to edit.
5. The DASH Clients details screen is displayed:

Client Type	Brokerage
Client Name English	Brokerage ABC
Client Name French	Brokerage ABC French

Sponsoring Organization	Sponsoring Company	
Organization A	Company A1	Delete ▶
Organization A	Company A2	Delete ▶
Organization A	Company A3	Delete ▶
Organization B	Company B1	Delete ▶
Organization B	Company B2	Delete ▶
Add Sponsor ▶		

Save   **Cancel**

6. Modify the *Client Type* if needed.
7. Modify the *Client Name English* if needed.
8. Modify the *Client Name French* if needed.

> **NOTE**
> The List of Sponsors is displayed only for brokerages, since other client types do not require sponsors.

If you have selected a brokerage as the client type, you can add or delete sponsors for the client:

9. Click on the **Add Sponsor ▶** link to add a sponsor for the brokerage (optional).
   a. The Add Sponsor dialogue is presented:

Clients

Add Sponsor

Organization ▾

Company ▾

Cancel   Save

TROUBLESHOOTING

- **The Clients function is not available in the menu:** Please contact your User Administrator.
- **I cannot find the required company in the list of sponsors:** Only insurance companies can sponsor brokerages. The drop-down menu includes all insurance companies that are available in DASH.

b. Select the sponsoring *Insurance Organization*.

c. Select the sponsoring *Insurance Company*.

d. Click on the **Save** button.

NOTE
You can click on the **Cancel** button to close the dialogue without adding a sponsor.

e. The sponsor is added to the *List of Sponsors*.

10. Click on the **Delete ▶** link next to the sponsor you want to delete (optional).

a. A dialogue is presented to confirm the deletion.

b. Confirm the deletion.

c. The sponsor is deleted from the *List of Sponsors*.

11. Click on the **Save** button to save the changes to the client.

NOTE
You can click on the **Cancel** button to return to the previous screen without saving the changes to the client.

Clients

11-4 Deleting a Client

The Clients function allows you to delete a client from DASH.

Follow these steps to delete a client from DASH:

1. Log in to the DASH Portal.
2. Click on the hamburger menu ☰ and select the **Clients** option.

> NOTE
> Alternatively, you can use the landing page tiles to navigate to Clients (see Section 1-4 Navigation).

3. The Clients screen is presented:

Client ID	Client Name	Client Type		
	Client Name	Start typing to search		New Client
C001	Brokerage ABC	Brokerage	Delete ▶	Details ▶
C002	Facility Association	Other		Details ▶
C003	Brokerage DEF	Brokerage		Details ▶
C004	Applied	Commercial Third Party	Delete ▶	Details ▶
IBC	Insurance Bureau of Canada	IBC		Details ▶
C005	Commercial XYZ	Commercial Third Party		Details ▶

4. Click on the **Delete ▶** link next to the client you want to delete.

5. A dialogue is presented to confirm the deletion.
6. Confirm the deletion.
7. The client is deleted from DASH.

> TROUBLESHOOTING
>
> - **The Clients function is not available in the menu:** Please contact your User Administrator.
> - **Delete link is not available:** The DASH Clients function will not allow you to delete clients that had employees assigned at any point.