PolicyStream

FOR CARRIER PARTNERS

PolicyStream Autofill

How it works · How your questions stay word for word · How data is protected

Autofill is a browser tool for licensed advisors, used in Google Chrome. It copies answers the client already gave in PolicyStream into **your** e-application, inside the advisor's own signed-in session. **The advisor stays in control: nothing is submitted, signed or consented to for them.**

1 HOW IT WORKS

1. **Client answers your questions**, word for word, through a secure link.
2. **Advisor reviews** the submission and every Yes answer.
3. **Advisor signs in to your e-app** as usual, with their own login and 2FA.
4. **Autofill fills fields one at a time**, highlighting each one. Anything needing the advisor is flagged red.
5. **Advisor checks every page** and submits through your process.

AUTOFILL NEVER

- ✕ Submits, signs or requests signatures
- ✕ Ticks declarations or consents
- ✕ Answers a question whose wording changed
- ✕ Sees or stores carrier logins
- ✕ Calls your systems or APIs

3 SECURITY

- ✓ **Hosted in Canada** (AWS Canada Central)
- ✓ **Encrypted** at rest and in transit
- ✓ **Personal keys** that expire and can be revoked by the advisor or firm admin
- ✓ **Least access:** an advisor only reads their own submitted clients, and every read is logged
- ✓ **Nothing left behind:** client data clears when Chrome closes
- ✓ **Runs only** on supported e-app sites
- ✓ **MFA** for firm admins; cyber and E&O insurance in force

2 WORD-FOR-WORD MATCHING

A question is filled only if the text on your screen is exactly the text the client answered.

Capture — Copied verbatim from your live e-app › **Version** — Saved as a dated form version › **Verify** — Build fails on any mismatch › **Check live** — Re-read on your page before filling

- **One source of truth.** The client form and Autofill's expected wording come from the same versioned file.
- **Exact live check.** Autofill compares each question on your page with the expected text, case-sensitive. Only spacing is ignored.
- **New questions caught.** Each page has a list of known text, so added questions are flagged too.
- **On any difference**, the field stays blank, outlined red, and the run pauses for the advisor.
- **Closed loop.** We're alerted automatically (client details removed), update the form and ship a new verified version.

WHY IT HELPS CARRIERS

Cleaner apps
Fewer keying errors and less rework

Exact disclosure
Clients see your wording, not a paraphrase

No integration
Your e-app and controls stay as they are

WORKING TOGETHER

We welcome advance notice of wording changes, a test environment and a review of our mapping. If something concerns you, talk to us and we'll address it directly.

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