REQUEST FOR INFORMATION WORKFLOW USER GUIDE

(FOR SECURITY & OPERATIONS PERSONNEL)

Version Control: October 2025 – 1.2

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INTRODUCTION

The Request for Information (RFI) approval workflow is the process of approving an Information Release request from the requester for security and privacy reasons. The RFI approval workflow progresses through several status stages. These stages ensure the request is legitimate, and authorized by the approver. The process includes review, verification, and authentication of the request. The RFI approval workflow tracks the progress of each request.

There are five scenarios associated with an RFI.

Scenario A – Requested Information is an Emergency

Scenario B – Requested Information is not Available

Scenario C – Requested Information is Available - PO or Subpoena is Required

Scenario D – Requested Information is Available -- PO Subpoena is not Required

Scenario E – Requested Information is Available – PO or Subpoena is required -- Police Decline to Proceed.

ROLES

The following table outlines the roles that may be involved in an RFI at a Morguard owned or operated property.

Role name	Role definition
Requester	A requester falls into one of four categories: • **Insurer** – A representative from an insurance company involved with the RFI. • **Law Enforcement** – Typically a police officer. • **Legal Counsel** – A representative of the legal profession involved in the RFI. • **Personal** – An individual making an RFI on their own behalf.

Role name	Role definition
Security Supervisor	The individual designated as the security supervisor for the Morguard owned or managed property that receives the RFI. This individual may or may not directly facilitate the RFI. The supervisor is responsible for assisting security staff, requesters, or anyone from the Claims Department at Morguard.
Security Personnel	These are members of the security staff at the Morguard owned or operated property that receives the RFI. If they are approached, or contacted by a requester, they are responsible for facilitating the RFI on behalf of the requester. They are also responsible for completing the parts of the workflow that involve the security department. If they are unsure as to how to proceed, they must contact their security supervisor for assistance.

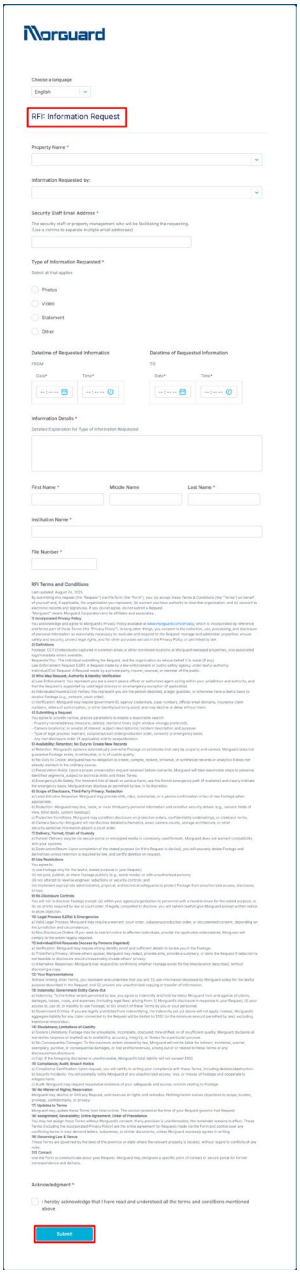
INITIATING THE WORKFLOW

The workflow is initiated when a requester (Insurer, Law Enforcement, Legal Counsel, or Personal) contacts the on-site security team to make a request for information (RFI). The request is related to an incident that has occurred at the Morguard owned or managed property. The requester may be on-site, or they may contact the security department from a remote location.

If the requester is on-site, they go to the security office to make their request. A member of the security team works with the requester to facilitate their RFI. The process can begin by the requester scanning the QR code at the property.

If the requester is contacting the security office from a remote location, the security team member facilitating the request can send the following link to the requester. In these instances, the security facilitator **must ask** the requester for their email address. This is necessary as the workflow process **may** include correspondence emailed to the requester.

After scanning the QR code, or clicking the link, the **Morguard RFI: Information Request** form opens.



All fields with an asterisk * need a valid entry before the form is submitted and accepted. The next section, Accessing and Completing the RFI Form details the steps required for the requester and facilitator to complete, and submit the form.

Note: The form and screenshots displayed in this guide are captured from clicking the link, but the same fields appear if the requester opens the form using the QR code from their mobile device.

Accessing and Completing the RFI Form

Have the requester open and complete the form. Be prepared to assist the requester with any questions they have when completing the form.

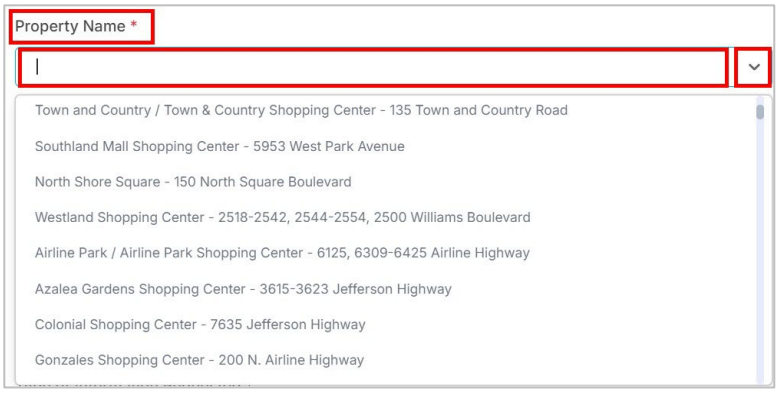
Note: As a facilitator, you **can** complete the form on behalf of the requester if they **cannot** do so themselves.

Choose a language

The Morguard RFI form is bilingual. The language is set to English by default. To switch to French, click or tap the down caret for the **Choose a language** field, and select **French** from the drop-down menu.

Note: Email communications are sent in French, based on the location of the property. However, the form itself is bilingual.

Property Name



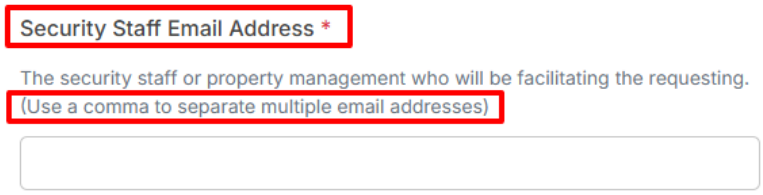
Have the requester select the property associated with the RFI. Advise them to either click the down caret, and scroll the list of properties, or start typing the name of the property and select it when it appears on-screen for them.

Note: As you type the name of the property, the list of properties narrows to match your entry. If you are unsure of the property name, try searching by entering the address of the property.

Information Requested by:

Have the requester click or tap the down caret and select the option that most closely describes their role.

Security Staff Email Address



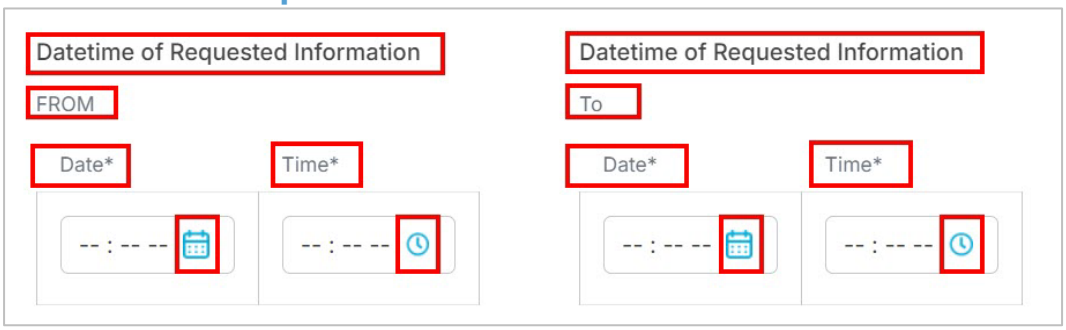
Have the requester enter your email address or the email address of the security team member facilitating the request on their behalf. **You can also enter multiple email addresses by comma separator**

Note: Confirm receipt of the submitted request in your inbox **after** the requester has completed and submitted the form. Part B of the form is emailed to the security facilitator after the requester has submitted the form.

Type of Information Requested

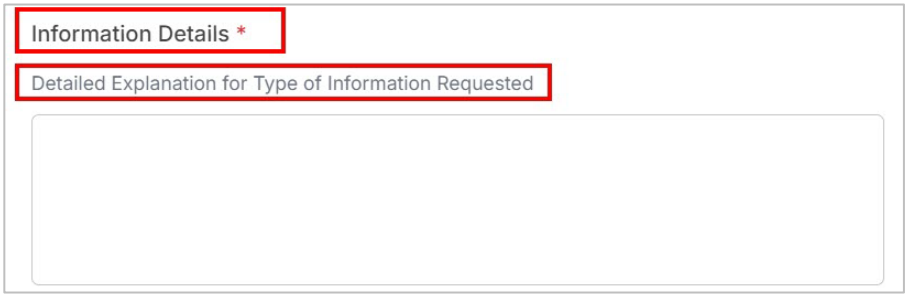
Have the requester specify the information they are requesting (**Photos**, **Video**, **Statement**, or **Other**). If they specify **Other**, have them provide an explanation in the field that appears.

Datetime of Requested Information



Have the requester specify the **Date** and **Time** range for the requested information.

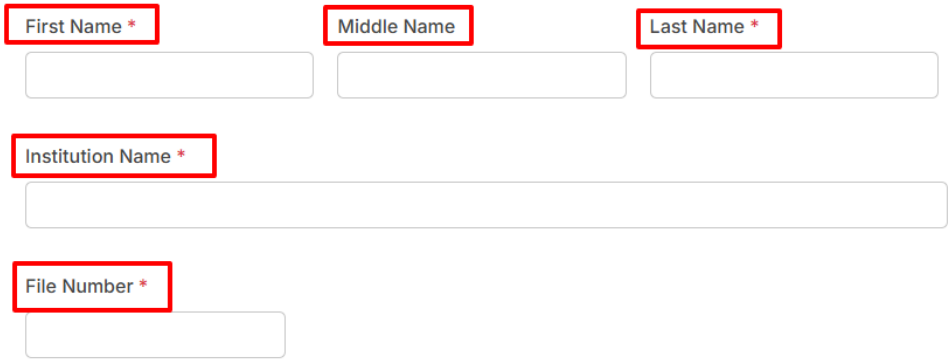
Information Details



Have the requester enter a detailed explanation in the field provided.

Final Fields for Completion of RFI – Insurer and Legal Counsel

The final fields to complete the RFI vary depending on the role of the requester. These fields appear for requesters that select **Insurer** or **Legal Counsel**.



Make sure the requester enters their first and last name. The **Institution Name** field relates to the company they work for.

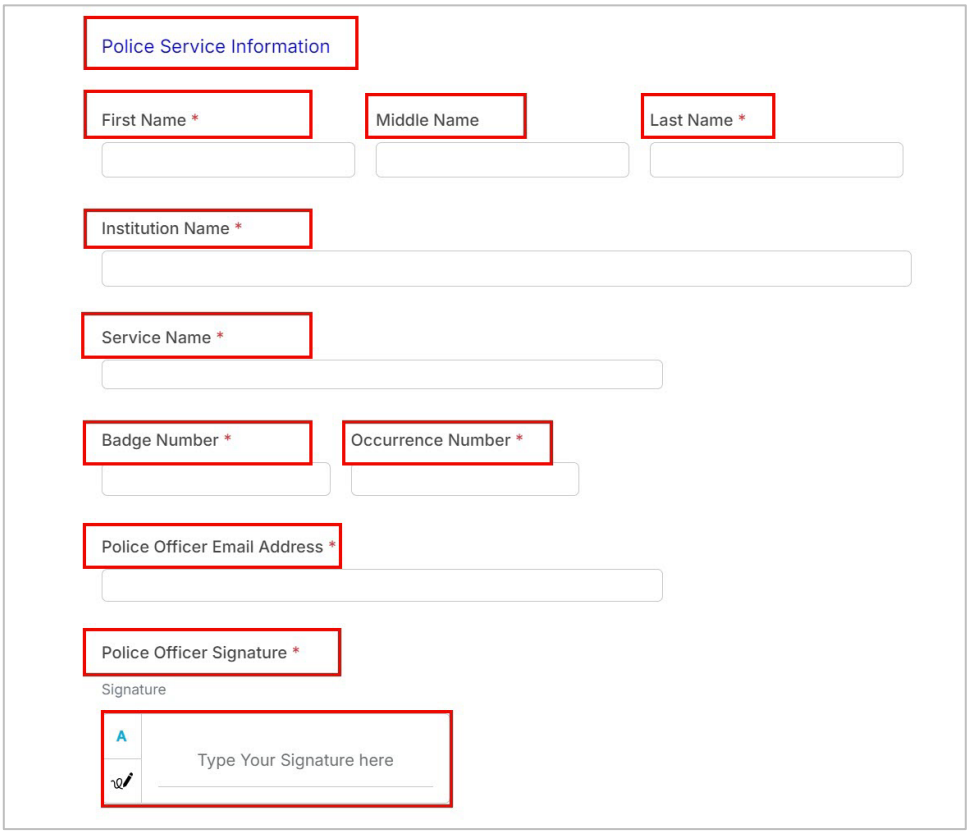
When the requester has completed the form, have them review the form for completeness, and accuracy, and then, have them click, or tap the **Submit** button.

Final Fields for Completion of RFI – Personal

If the requester is completing the RFI for themselves, they need to complete the same fields **except** for the **Institution Name** field. Have them follow the same instructions as above to **Submit** the RFI form.

Final Fields for Completion of RFI – Law Enforcement

The final fields to complete the RFI vary depending on the role of the requester. These fields appear for requesters that selected **Law Enforcement**.



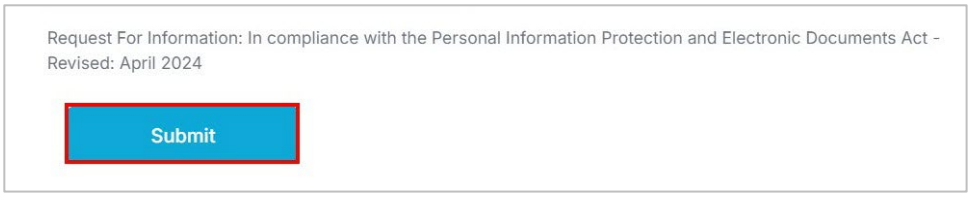
Institution Name – Have the requester enter the name of their law enforcement agency. This may include Division number, Precinct number, or other unique name used to identify their agency.

Badge Number – Have the requester enter their badge number.

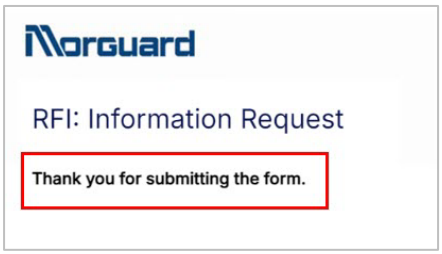
Police Officer Email Address – Have the requester enter their email address.

Police Officer Signature – Depending on the device used by the requester, have them sign, or type their name in the **Signature** field.

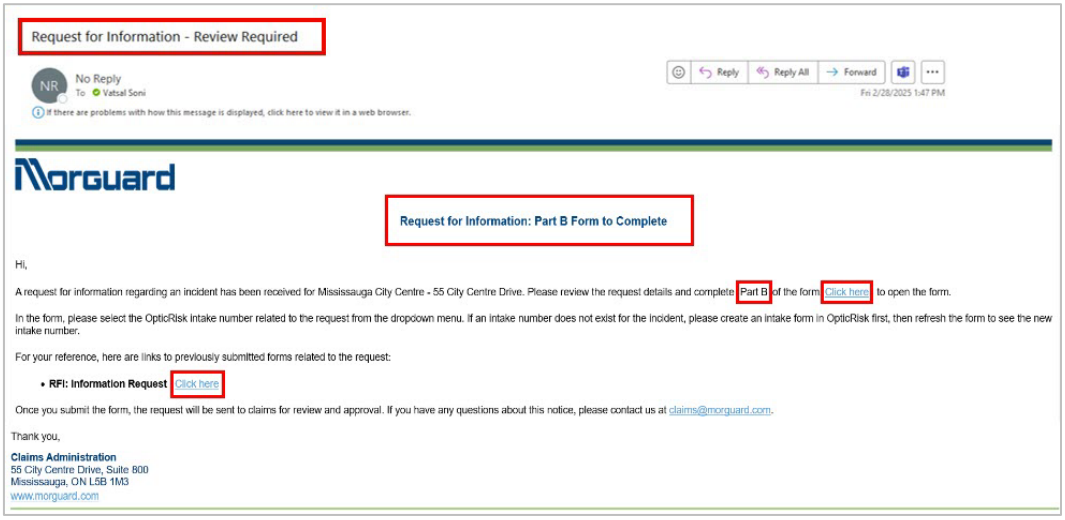
Submitting the Form



Have the requester review the form for accuracy and completeness. When they are ready to proceed, have them click, or tap the **Submit** button. The requester receives a confirmation message that their form has been successfully submitted.



At the same time, an email is sent to the security member facilitating the request.



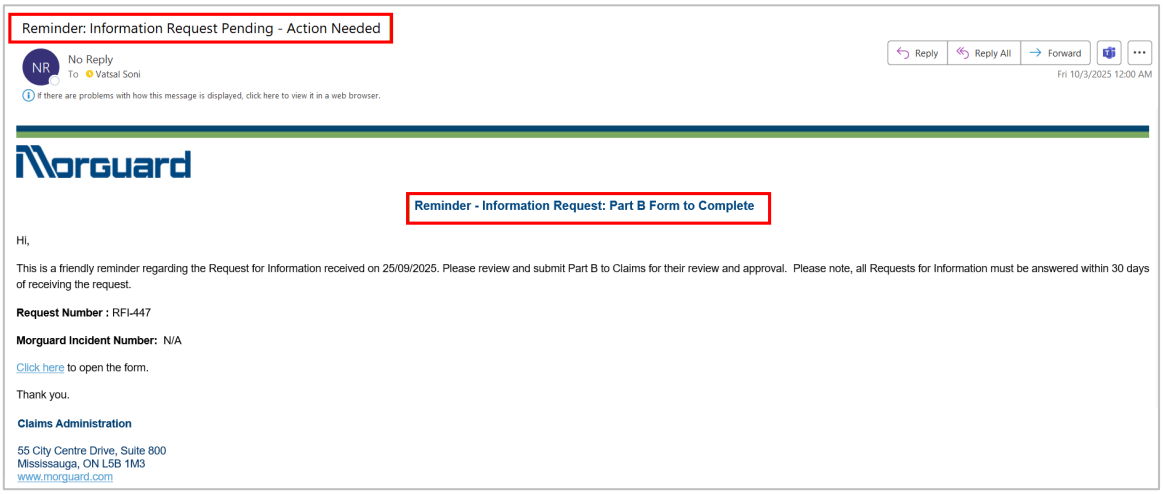
Note: If the security member **does not** receive an email, it may indicate that the requester **did not** enter the email address of the security facilitator correctly. Review the email address with the requester to ensure the email address is correct.

To review the submitted RFI, click or tap the **Click here** link beside •**RFI Information Request** notation.

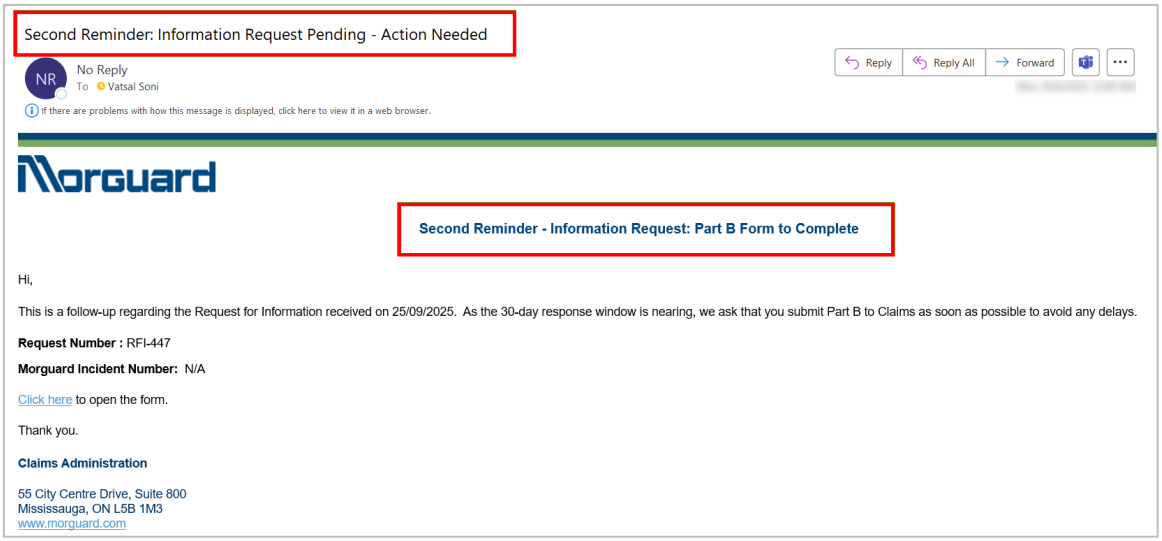
To complete **Part B** of the form, click, or tap the **Click here** link in the first paragraph of the email. The **RFI: Security Supervisor Information** form opens. Five unique RFI scenarios are described. Part B must be submitted and received within 30 days of submitting the RFI Form.

Note: Until Part B is submitted, email reminders are sent after seven, ten, and 27 days.

After 7 days:



After 10 days



Second Reminder: Information Request Pending - Action Needed

NR No Reply
To Vatsal Soni

Reply | Reply All | Forward

If there are problems with how this message is displayed, click here to view it in a web browser.

Morguard

Second Reminder - Information Request: Part B Form to Complete

Hi,

This is a follow-up regarding the Request for Information received on 25/09/2025. As the 30-day response window is nearing, we ask that you submit Part B to Claims as soon as possible to avoid any delays.

Request Number : RFI-447

Morguard Incident Number: N/A

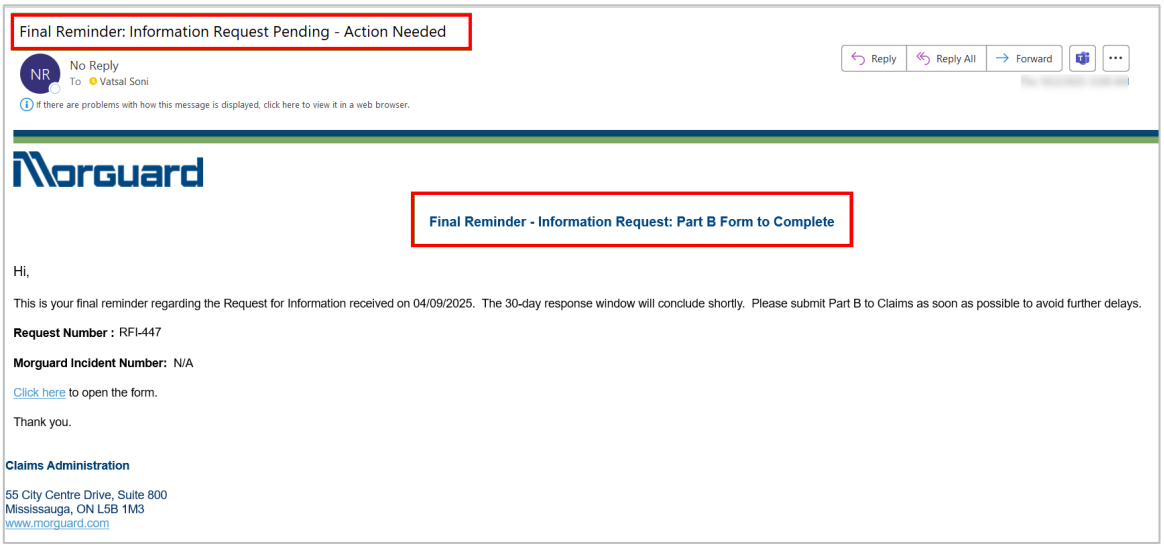
Click here to open the form.

Thank you.

Claims Administration

55 City Centre Drive, Suite 800
Mississauga, ON L5B 1M3
www.morguard.com

After 27 days



Final Reminder: Information Request Pending - Action Needed

NR No Reply
To Vatsal Soni

Reply | Reply All | Forward

If there are problems with how this message is displayed, click here to view it in a web browser.

Morguard

Final Reminder - Information Request: Part B Form to Complete

Hi,

This is your final reminder regarding the Request for Information received on 04/09/2025. The 30-day response window will conclude shortly. Please submit Part B to Claims as soon as possible to avoid further delays.

Request Number : RFI-447

Morguard Incident Number: N/A

Click here to open the form.

Thank you.

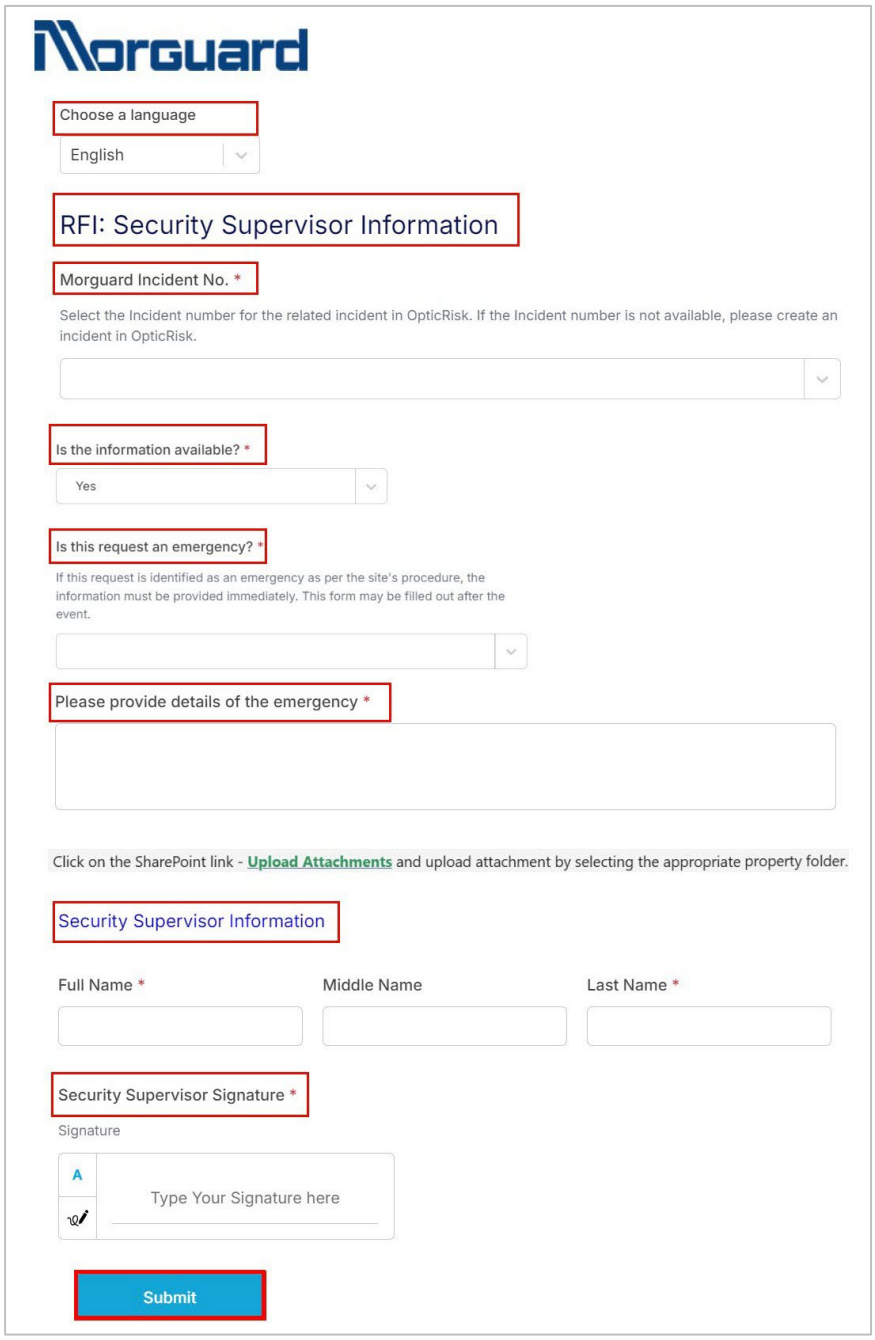
Claims Administration

55 City Centre Drive, Suite 800
Mississauga, ON L5B 1M3
www.morguard.com

SCENARIO A – REQUESTED INFORMATION IS AN EMERGENCY

This scenario describes how to complete the form for an emergency scenario. As per the form, **and** on-site policy, provide the information **immediately**, and complete the form later.

Part B – RFI: Security Supervisor Information Form



Choose a language – The default language setting is English. Click or tap the caret and select French to change the language. See the Choose a language section in this guide for additional information about switching the language to French.

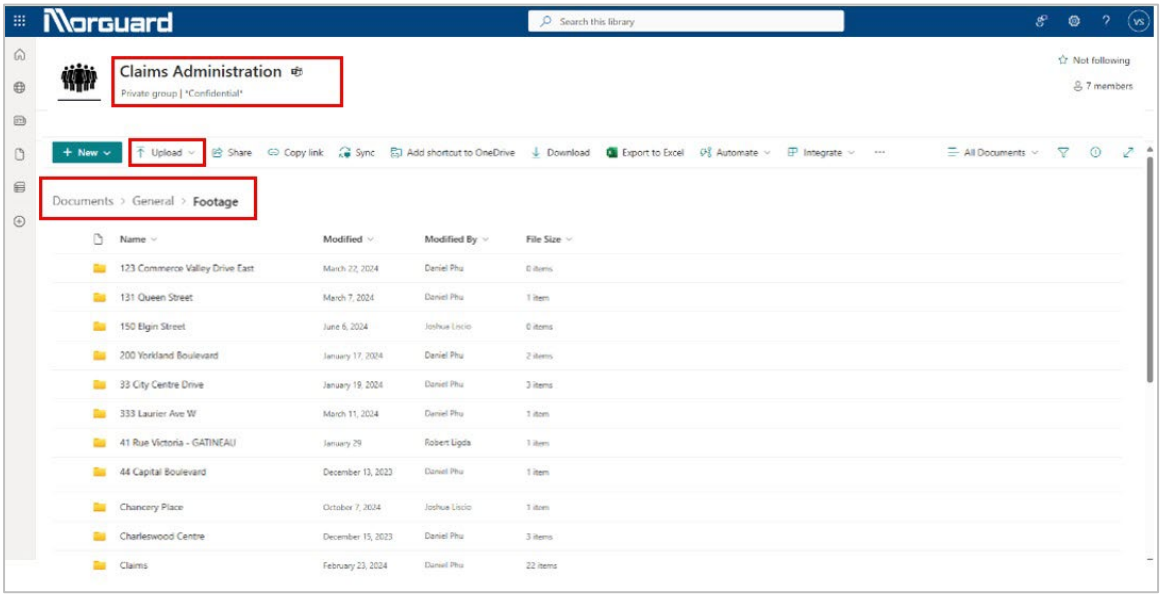
Morguard Incident No. – Click or tap the down caret, scroll the results window, and select the incident number for the related incident in our **Online Incident Report** system. If the incident number **does not** appear in the window, create an incident number in system. After creating the incident number, open the window, and select the incident number.

Note: Check the internal process documentation for creating an incident number in the **Online Incident Report** system, or contact your security supervisor if you need assistance.

Is the information available? – Determine if the requested information for the incident (video, photos, statements) is available. Click or tap the down caret, and select the correct answer (**Yes** or **No**). If the answer is yes, a new field appears asking if the request is an emergency.

Is this request an emergency? – In all likelihood, the request was an emergency, and the information is being entered after actions have been taken to address the emergency. Explain the emergency in the provided explanation box.

Upload Attachments – Click the link to upload any attachments related to the incident. The link opens the **Claims Administration** site to the **Documents > General > Footage** folder. Locate and open the property you want to upload the attachment(s) to. Then, click the **Upload** link, and upload the attachment(s).



Security Supervisor Information

Enter your name and then, digitally sign the form. Review the form for accuracy and completeness and make any required updates. Click or tap the **Submit** button to proceed.

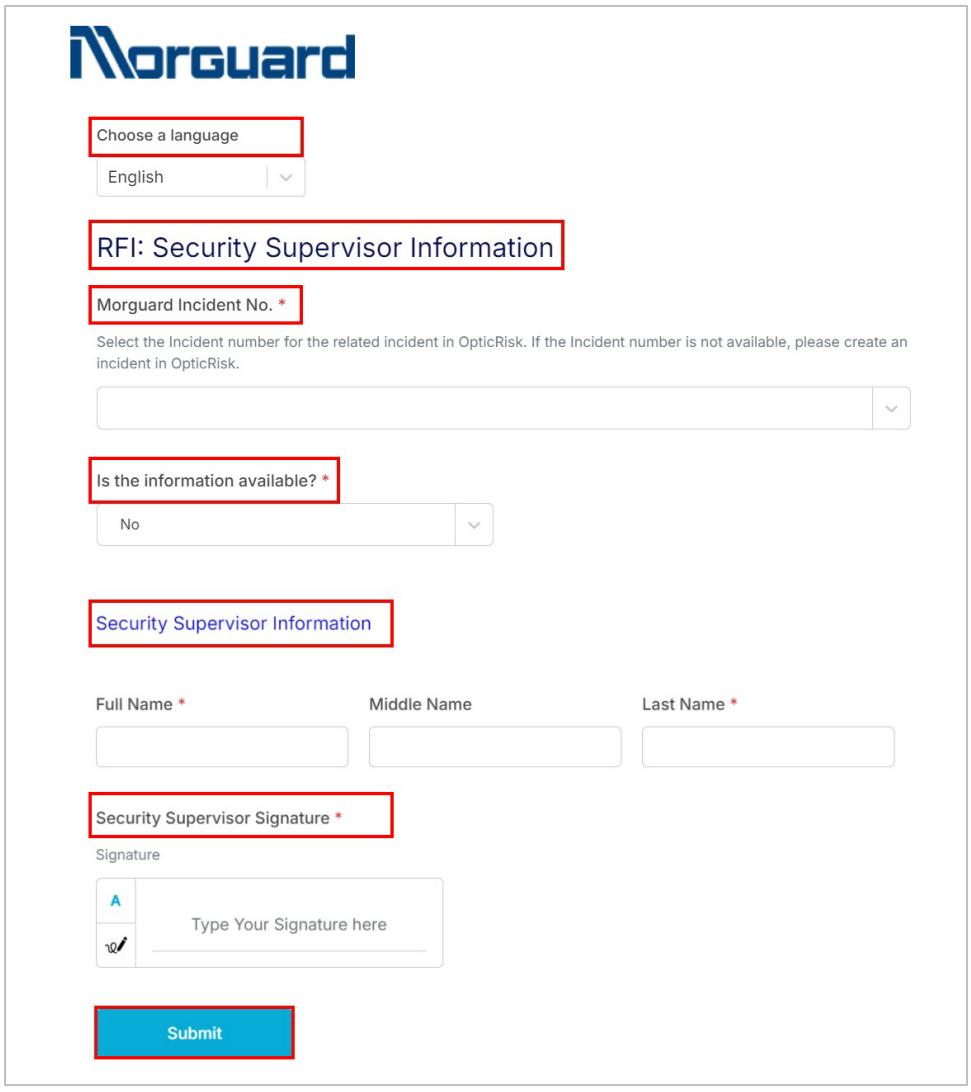
As this was an emergency scenario, there is **no** validation, or approval process required from the Claims team. You can release the information to the requester. The Claims team completes the process later.

SCENARIO B – REQUESTED INFORMATION IS NOT AVAILABLE

This scenario describes how to complete the form when the information requested is not available.

Note: Before proceeding to complete the form, ensure the request is **not** an emergency. If it is an emergency, refer to Scenario A, and follow the instructions provided.

Security Supervisor Completes Part B



Choose a language – The default language setting is English. Click or tap the caret and select French to change the language. See the Choose a language section in this guide for additional information about switching the language to French.

Morguard Incident No. – Click or tap the down caret, scroll the results window, and select the incident number for the related incident in the **Online Incident Report** system. If the incident number **does not** appear in the window, create an incident number in the system. After creating the incident number, open the window, and select the incident number.

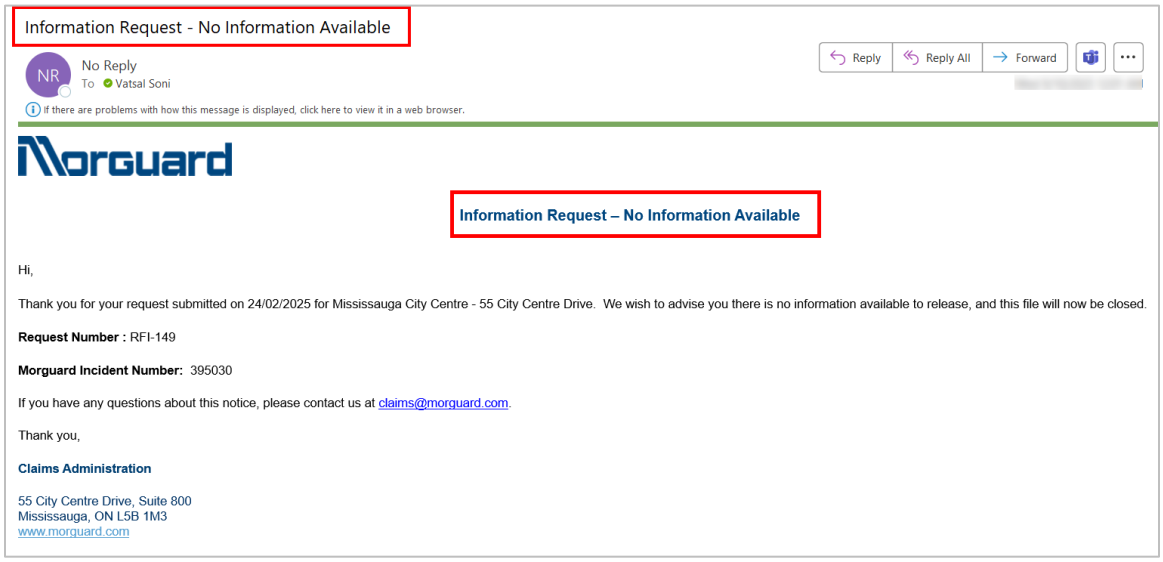
Note: Check the internal process documentation for creating an incident number in the **Online Incident Report** system, or contact your security supervisor if you need assistance.

Is the information available? – Determine if the requested information for the incident (video, photos, statements) is available. Click or tap the down caret, and select the correct answer (**Yes** or **No**). In this scenario, the answer is **No**.

Security Supervisor Information – Enter your name and then, digitally sign the form. Review the form for accuracy and completeness and make any required updates. Click or tap the **Submit** button to proceed. The form is sent to the Claims team.

In this scenario, since the information is **not** available, **no** further action is required from you.

An email is sent to the requester informing them that no information is available, and that the case is being closed.


Information Request - No Information Available

NR

No Reply

To Vatsal Soni

Reply | Reply All | Forward

If there are problems with how this message is displayed, click here to view it in a web browser.

Morguard

Information Request – No Information Available

Hi,

Thank you for your request submitted on 24/02/2025 for Mississauga City Centre - 55 City Centre Drive. We wish to advise you there is no information available to release, and this file will now be closed.

Request Number : RFI-149

Morguard Incident Number: 395030

If you have any questions about this notice, please contact us at claims@morguard.com.

Thank you,

Claims Administration

55 City Centre Drive, Suite 800
Mississauga, ON L5B 1M3
www.morguard.com

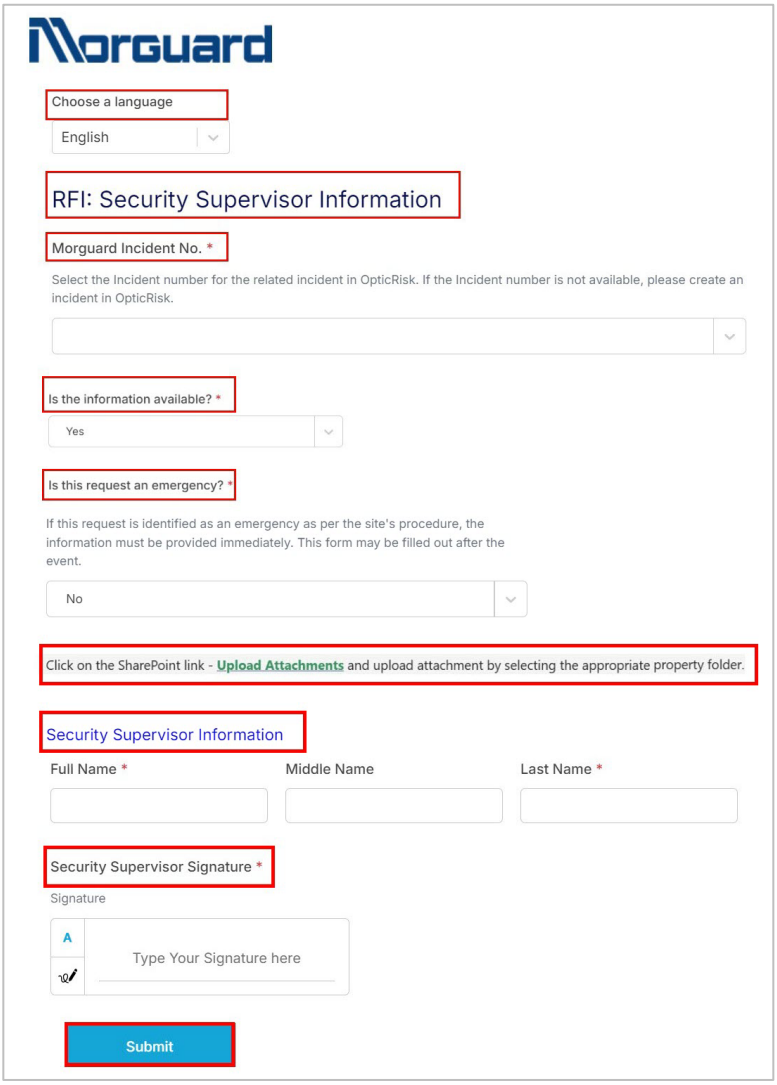
SCENARIO C – REQUESTED INFORMATION IS AVAILABLE – PO OR SUBPOENA IS REQUIRED

Security Supervisor Completes Part B

This scenario describes how to complete the form when the information requested is available, and a production order (PO), or subpoena is required.

Note: Production orders are used by law enforcement agencies in Canada and subpoenas are used by law enforcement agencies in the United States. The examples used in this guide based in Canada and thus, POs are used.

Note: Before proceeding to complete the form, ensure the request is **not** an emergency. If it is an emergency, refer to Scenario A, and follow the instructions provided.



Choose a language – The default language setting is English. Click or tap the caret and select French to change the language. See the Choose a language section in this guide for additional information about switching the language to French.

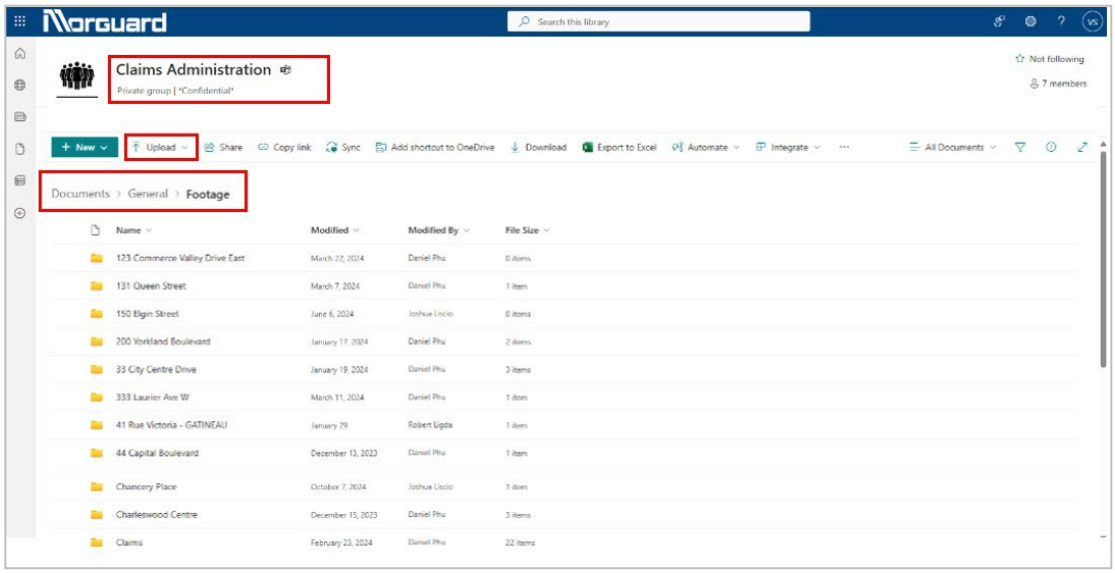
Morguard Incident No. – Click or tap the down caret, scroll the results window, and select the incident number for the related incident in the **Online Incident Report** system. If the incident number **does not** appear in the window, create an incident number in the system. After creating the incident number, open the window, and select the incident number.

Note: Check the internal process documentation for creating an incident number in the **Online Incident Report** system, or contact your security supervisor if you need assistance.

Is the information available? – Determine if the requested information for the incident (video, photos, statements) is available. Click or tap the down caret, and select the correct answer (**Yes** or **No**). In this scenario, the answer is **Yes**.

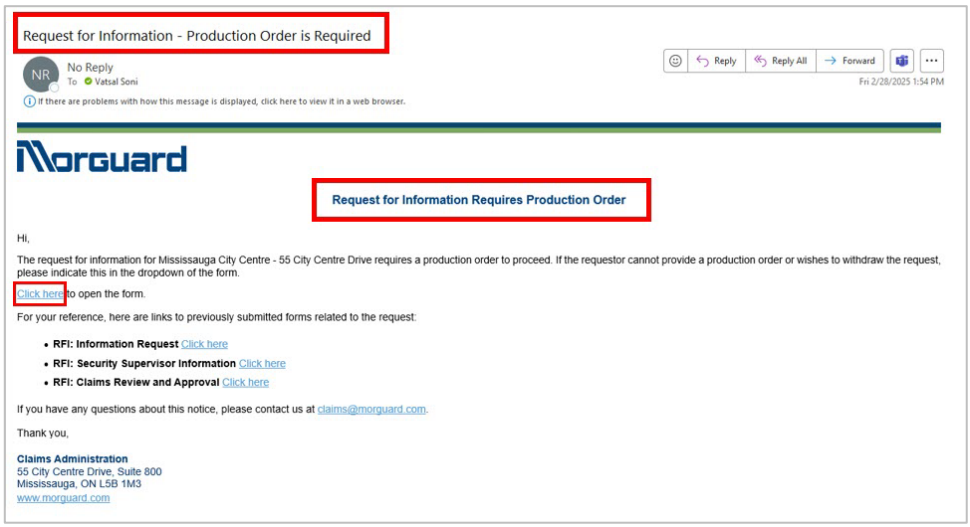
Is this request an emergency? – As this scenario is **not** an emergency, click or tap the down caret, and select **No**.

Upload Attachments – Click the link to upload any attachments related to the incident. The link opens the **Claims Administration** site to the **Documents > General > Footage** folder. Locate and open the property you want to upload the attachment(s) to. Then, click the **Upload** link, and upload the attachment(s).



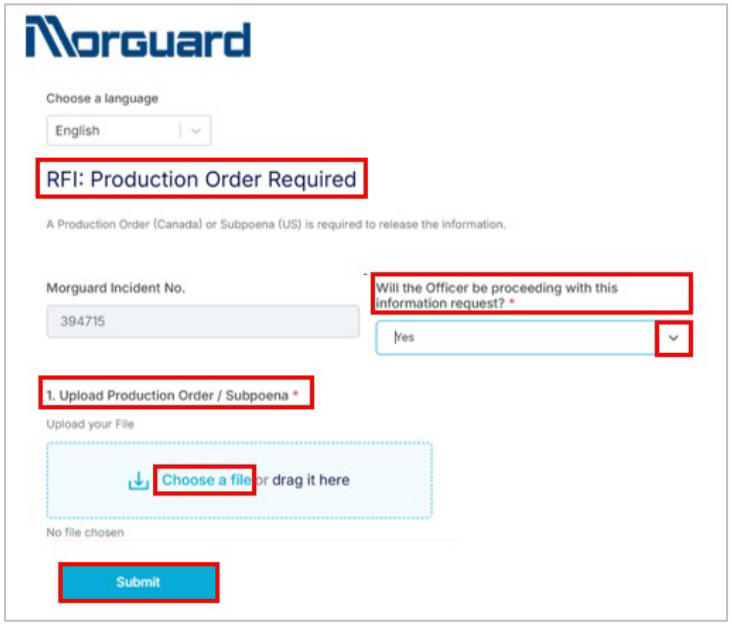
Security Supervisor Information – Enter your name and then, digitally sign the form. Review the form for accuracy and completeness and make any required updates. Click or tap the **Submit** button to proceed. The form is sent to the Claims team.

The Claims team review the request and determine whether a PO is required before releasing the requested information. If required, they email the security individual facilitating the RFI. The subject line of the email states, **Request for Information – Production Order is Required**.



The security facilitator is responsible for letting the requester know that they must provide a PO to proceed with their RFI. If the requester agrees to proceed, they **must** provide the security facilitator with the requested PO.

The security facilitator must then click the **Click here** link to open the form to attach the PO. The **RFI: Production Order Required** screen opens.



Will the Officer be proceeding with this information request? – Click or tap the down caret and select **Yes**.

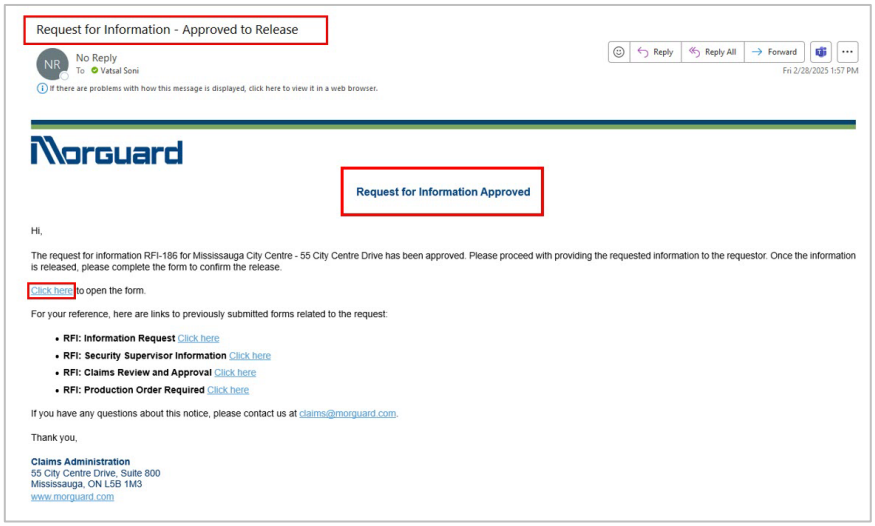
Note: If the officer decides **not** to proceed with the request, select **No** from the drop-down menu. Click or tap the **Submit** button and consider the RFI to be **canceled**.

Upload Production Order / Subpoena – Click the **Choose a file** link and upload the PO to the same property file you loaded the information to.

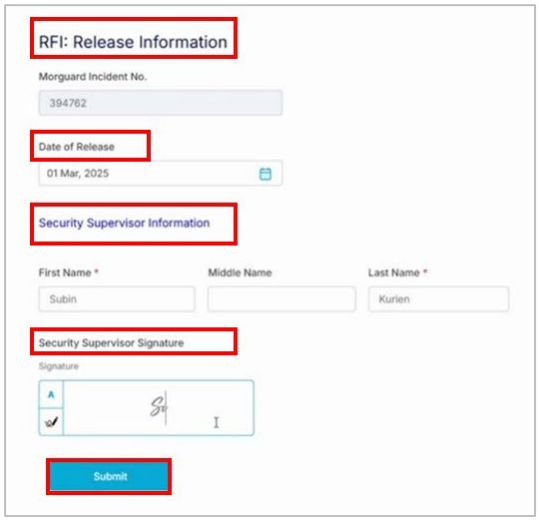
Click or tap the **Submit** button. The updated form with attached PO is sent to the Claims team for review.

Releasing the Information

If the Claims team approve the request to release the requested information, the security facilitator receives another email. The subject line for this email is titled, **Request for Information – Approved for Release**.



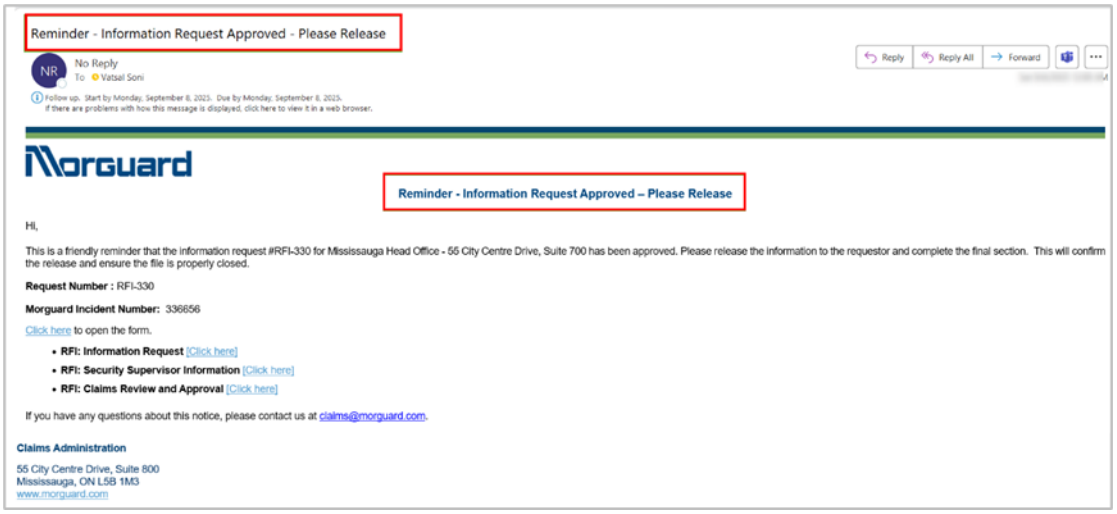
Click the **Click here** link to open the form. The **RFI: Release Information** screen opens.



Date of Release – Enter or select the date you are releasing the requested information to the requester.

Security Supervisor Information – Enter your name and then, digitally sign the form. Review the form for accuracy and completeness and make any required updates. Click or tap the **Submit** button. The form is sent to the Claims team, and **no** further action is required by you.

Note: Until the **RFI: Release Information** form is submitted, email reminders are sent after seven, ten, and 27 days.



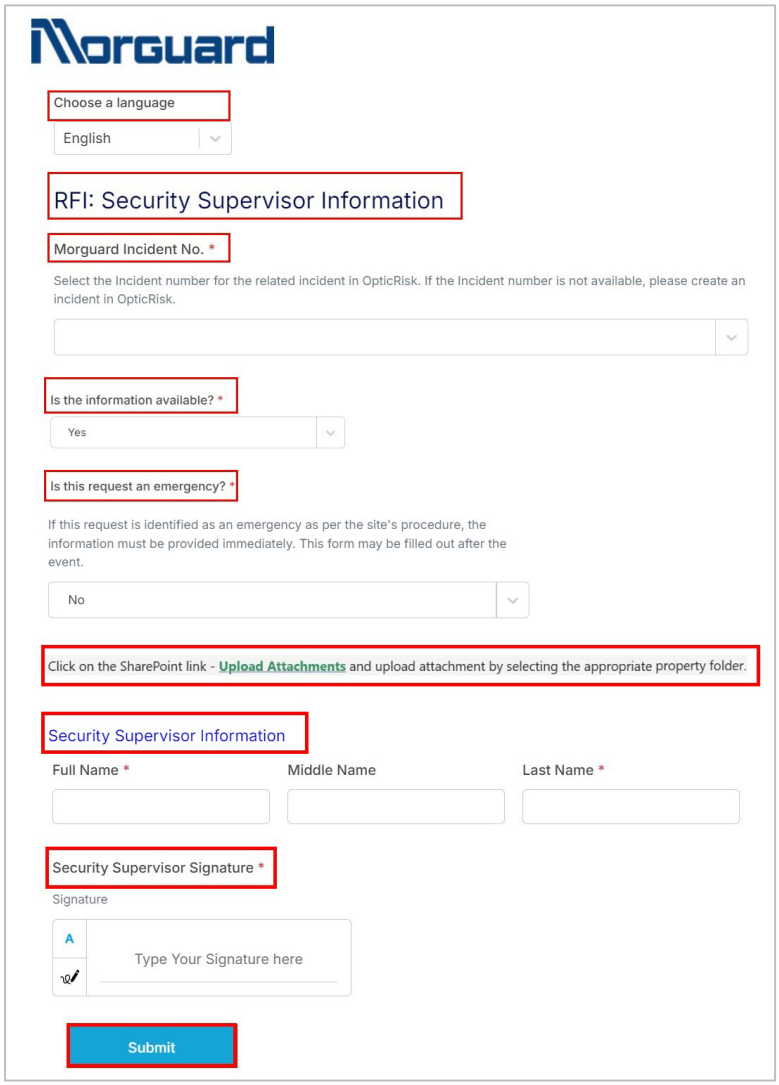
SCENARIO D –REQUESTED INFORMATION IS AVAILABLE – PO OR SUBPOENA IS NOT REQUIRED

Security Supervisor Completes Part B

This scenario describes how to complete the form when the information requested is available, and a Production Order (PO), or Subpoena is **not** required.

Note: Production Orders are used by law enforcement agencies in Canada and subpoenas are used by law enforcement agencies in the United States. The examples used in this guide based in Canada and thus, POs are used.

Note: Before proceeding to complete the form, ensure the request is **not** an emergency. If it is an emergency, refer to Scenario A, and follow the instructions provided.



Choose a language – The default language setting is English. Click the caret and select French to change the language. See the Choose a language section in this guide for additional information about switching the language to French.

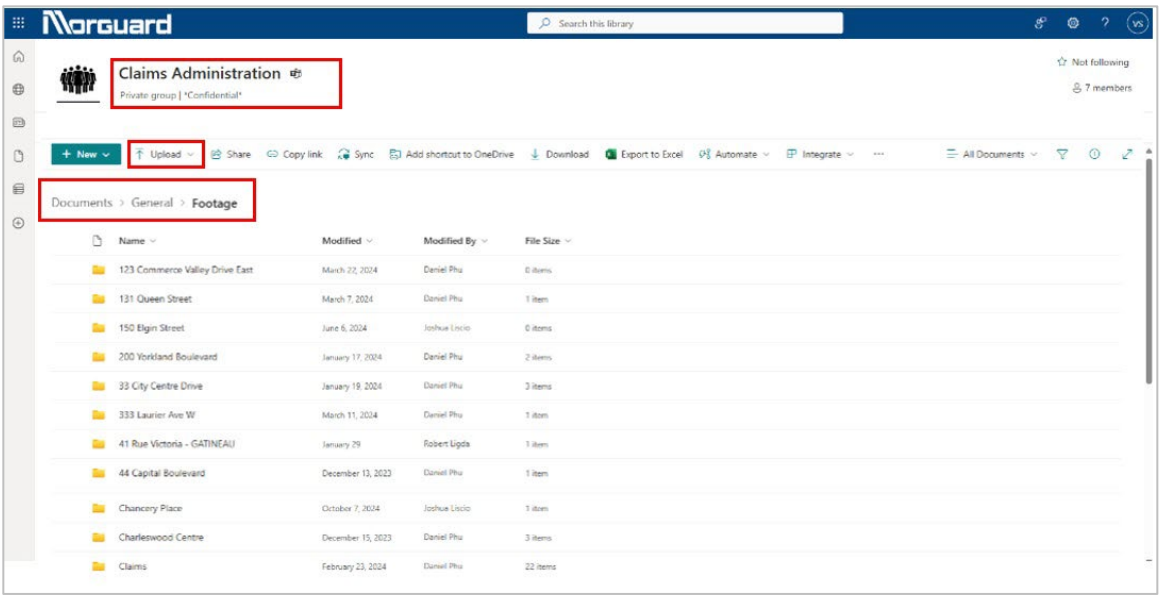
Morguard Incident No. – Click or tap the down caret, scroll the results window, and select the incident number for the related incident in the **Online Incident Report** system. If the incident number **does not** appear in the window, create an incident number in the system. After creating the incident number, open the window, and select the incident number.

Note: Check the internal process documentation for creating an incident number in **Online Incident Report** system, or contact your security supervisor if you need assistance.

Is the information available? – Determine if the requested information for the incident (video, photos, statements) is available. Click or tap the down caret, and select the correct answer (**Yes** or **No**). In this scenario, the answer is **Yes**.

Is this request an emergency? – As this scenario is **not** an emergency, click or tap the down caret, and select **No**.

Upload Attachments – Click the link to upload any attachments related to the incident. The link opens the **Claims Administration** site to the **Documents > General > Footage** folder. Locate and open the property you want to upload the attachment(s) to. Then, click the **Upload** link, and upload the attachment(s).

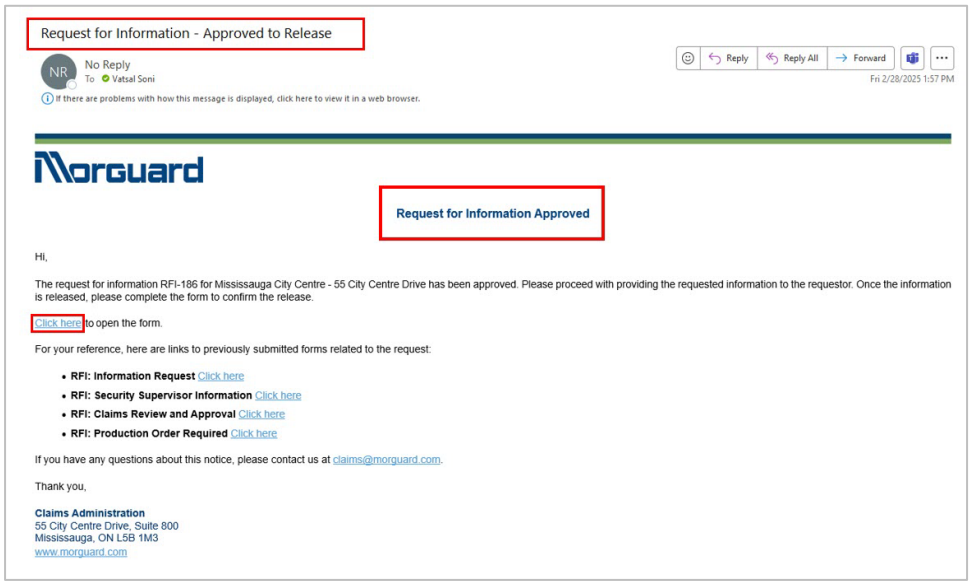


Security Supervisor Information – Enter your name and then, digitally sign the form. Review the form for accuracy and completeness and make any required updates. Click or tap the **Submit** button to proceed. The form is sent to the Claims team.

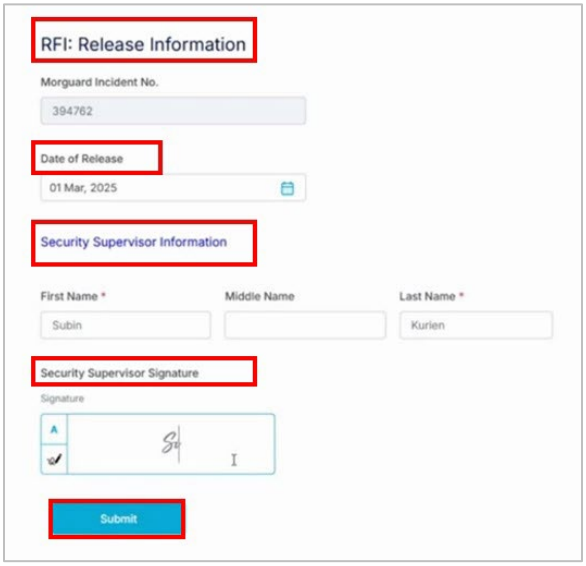
The Claims team review the request and determine whether a PO is required before releasing the requested information. If required, they email the security individual facilitating the RFI. In this example, the Claims team determines a PO is not required to release the requested information.

Releasing the Information

If the Claims team approve the request to release the requested information, the security facilitator receives another email. The subject line for this email is titled, **Request for Information – Approved for Release**.



Click the **Click here** link to open the form. The **RFI: Release Information** screen opens.



Date of Release – Enter or select the date you are releasing the requested information to the requester.

Security Supervisor Information – Enter your name and then, digitally sign the form. Review the form for accuracy and completeness and make any required updates. Click or tap the **Submit** button. The form is sent to the Claims team, and **no** further action is required by you.

Note: Until the **RFI: Release Information** form is submitted, email reminders are sent after seven, ten, and 27 days.

SCENARIO E – REQUESTED INFORMATION IS AVAILABLE – PO OR SUBPOENA IS REQUIRED – POLICE DECLINE TO PROCEED

Refer to Scenario C. The steps to follow are the same as detailed in Scenario C. If the law enforcement agency (police) **declines** to provide the requested PO (Canada) or subpoena (United States), the RFI is canceled, and **no** further action is required at the site level.

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Tel: 905.281.3800