Verisk™

# Verisk Underwriting Intelligence

**MCP Implementation & Support Guide**

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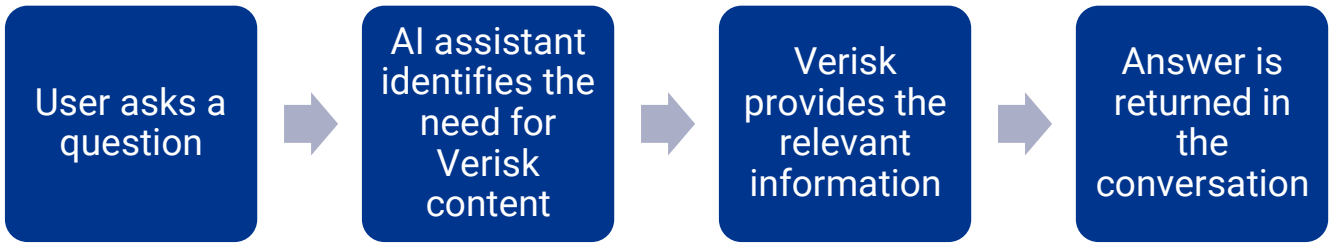
# Section 1: Introduction

## Overview

Verisk Underwriting Intelligence connects supported AI assistants to select Verisk underwriting and premium audit content, insights, workflows, and functionality. Underwriters, actuaries, product teams, premium audit teams, and other insurance professionals can use natural language to explore information, analyze risk, and support business decisions.

## How it works

When a user asks a question that requires Verisk content, Verisk Underwriting Intelligence connects the AI assistant to the appropriate Verisk tool:




Where applicable, responses include **source references and suggested follow-up questions**, allowing users to continue exploring the topic within the AI assistant they already use.

## How it differs from a general-purpose AI assistant

General-purpose AI assistants do not have access to Verisk's proprietary, continuously updated underwriting content.

Verisk Underwriting Intelligence connects applicable questions to Verisk's systems so users can access **current, licensed Verisk information directly within their AI assistant**. Access to content is based on the Verisk/ISOnet entitlements associated with the customer's organization.

| AI assistant alone | AI assistant + Verisk Underwriting Intelligence |
|---|---|
| • General-purpose information<br>• No direct access to licensed Verisk content | • Access to current Verisk underwriting content<br>• Content based on the user's Verisk entitlements |

## What's available

Verisk Underwriting Intelligence currently provides access to select content and capabilities in four areas:

- **Loss Cost Activity**

History of ISO Loss Cost filings by line of business and jurisdiction.

- **Loss Cost Indications**

  Current and recent ISO Loss Cost review outputs, including indicated and selected loss cost changes, and other supporting information.

- **ISO Experience Index**

  ISO loss experience index data for analyzing pure premium trends over time.

- **Premium Audit Advisory Service (PAAS)**

  Audit-specific answers for General Liability (GL), Businessowners (BOP), and Commercial Auto, drawing from thousands of classification guides and bulletins.

# Section 2: Requirements & Prerequisites

## Supported AI assistants

Verisk Underwriting Intelligence can be configured for the following AI assistants:

- **Microsoft Copilot**

  Supports agents built in Microsoft Copilot Studio and published to Microsoft Copilot or Microsoft Teams.

- **Claude**

  Supports claude.ai, the Claude desktop app, and Claude Cowork.

- **Amazon Quick**

  Supports the Amazon Quick web app and desktop app.

## Verisk subscriptions and entitlements

Verisk Underwriting Intelligence works with your organization's existing Verisk subscriptions and entitlements.

Customers will need:

- An existing **Verisk subscription** covering the lines of business and jurisdictions they intend to access.
- A **Verisk Underwriting Intelligence subscription** in addition to the underlying ISOnet subscription.
- Appropriate **user entitlements**, which determine the Verisk content each user can access.

## Administrator permissions

Administrator involvement may be required before Verisk Underwriting Intelligence can be configured:

- **Microsoft Copilot**: An environment administrator may need to enable the connector. The individual configuring the agent also needs the appropriate Copilot Studio maker permissions.
- **Claude**: For Enterprise workspaces, a Claude administrator must enable the plugin for the workspace.
- **Amazon Quick**: An account or workspace administrator must enable the connector before individual users can connect to it.

## Technical prerequisites

Before beginning setup, confirm that the requirements for your selected AI assistant are in place:

**Microsoft Copilot**

- An existing or new Copilot Studio agent.
- Generative orchestration or the new agent experience enabled.

**Claude**

- An Enterprise-level Claude plan that supports plugins and connectors.

**Amazon Quick**

- A subscription tier that supports connectors.
- The desktop application if using the published skill on desktop.

**Verisk**

- Valid Verisk/ISOnet credentials.
- Multi-factor authentication (MFA) configured.

## Before you begin

Before proceeding to configuration, verify that:

- You can successfully sign in to ISOnet using MFA.
- Your account includes the content you intend to access (e.g., products, lines of business, jurisdictions, etc.).
- Your selected AI assistant plan supports the required plugins, tools, or connectors.
- Verisk Underwriting Intelligence has been enabled by the appropriate administrator for your environment, workspace, or account.
- You can locate Verisk Underwriting Intelligence when beginning the configuration steps in Section 3.

# Section 3: Platform Configuration

Verisk Underwriting Intelligence can be configured for Microsoft Copilot, Claude, and Amazon Quick. Setup varies by platform.

Before beginning, complete the requirements and readiness checks in Section 2: Requirements & Prerequisites.

## Microsoft Copilot

Verisk UW Intelligence is added as a tool to an agent in Microsoft Copilot Studio. Once configured, the agent can be tested and published to the appropriate Microsoft channels.

**1. Open or create your agent**

Open Microsoft Copilot Studio and select an existing agent or create a new one.

**2. Add Verisk Underwriting Intelligence**

Locate Verisk UW Intelligence from the available tools and add it to your agent.

- **Classic experience**: Tools → Add a tool
- **New experience**: Build → Add a tool
- In the Add a tool dialog, select the MCP/Model Context Protocol tab and search for Verisk UW Intelligence to locate it.

If Verisk Underwriting Intelligence does not appear, contact your Copilot Studio administrator to confirm that it has been enabled for your environment.

**3. Connect to Verisk**

Select the option to create a new connection. When redirected to Verisk, sign in using your Verisk/ISOnet credentials and complete MFA.

**4. Review available tools**

Confirm that the Verisk UW Intelligence tools are enabled for the agent. If needed, individual tools can be enabled or disabled.

**5. Configure Premium Audit Advisory Service (PAAS), if applicable**

PAAS requires an additional configuration step:

- Classic experience: Add the PAAS instructions provided by Verisk to the agent's Instructions field.
- New experience: Upload the PAAS skill file provided by Verisk to the agent's Skills area.

Download the PAAS skill/instruction file: Download

The download includes PAAS/INSTRUCTION.md (for the Classic Experience Instructions field) and PAAS/SKILL.md (for the New Experience Skills area).

No additional configuration is required for Loss Cost Activity, Loss Cost Indications, or Experience Index.

**6. Test the connection**

Start a new session in **Test your agent** and ask: "What Verisk tools do you have access to?"

Confirm that the expected Verisk tools are returned.

If PAAS has been configured, test a relevant class-code question to confirm that PAAS is triggered correctly.

**7. Publish the agent**

Publish the agent and add the appropriate Microsoft Copilot and/or Teams channels. Complete your organization's standard testing and approval process before broader distribution.

**Important: First-time user connection**

The first time an individual user submits a question requiring Verisk Underwriting Intelligence, the user may be prompted to connect their Verisk account. The user signs in with their own Verisk credentials, completes authentication, and then retries the request. This establishes the user's individual connection to Verisk.

## Claude

For Claude, Verisk Underwriting Intelligence is installed as a **plugin**. The plugin installs the Verisk connector and PAAS capability together, simplifying configuration.

**1. Open the plugin directory**

In Claude, open Customize → Plugins → Browse plugins.

**2. Find Verisk Underwriting Intelligence**

Search for Verisk Underwriting Intelligence.

If the plugin/connector is not available in your Enterprise workspace, contact your Claude administrator to confirm that it has been enabled.

**3. Install the plugin**

Select Install. The plugin includes the Verisk connection and PAAS capability. After installing the plugin, open its **Connectors** section and click **Connect** to sign in

**4. Sign in to Verisk**

When prompted, sign in using your Verisk/ISOnet credentials and complete MFA.

**5. Review available tools**

Confirm that the expected Verisk tools are available. If the integration is shared with other users, those users will still authenticate with their own Verisk credentials.

**6. Test the connection**

Start a new Claude conversation and ask: “What Verisk tools do you have access to?”

Confirm that the expected tools are returned.

PAAS is included with the plugin, so no separate PAAS configuration is required.

**Claude-specific considerations**

- Install the Verisk Underwriting Intelligence plugin, rather than the connector independently.
- The plugin includes both the connector and PAAS capability.

## Amazon Quick

Verisk Underwriting Intelligence is added from the Amazon Quick connectors directory. PAAS configuration differs between web and desktop experiences.

**1. Open the connectors directory**

Open the Amazon Quick connectors directory.

**2. Find Verisk Underwriting Intelligence**

Search for Verisk Underwriting Intelligence. If it is not available, contact your Amazon Quick administrator to confirm that it has been enabled.

**3. Connect to Verisk**

Select Verisk Underwriting Intelligence and create the connection.

**4. Sign in to Verisk**

When prompted, sign in using your Verisk/ISOnet credentials and complete MFA.

**5. Review available tools**

Confirm that the expected Verisk tools are available. If the integration is shared with other users, those users will still authenticate with their own Verisk credentials.

**6. Test the connection**

Open a Chat Agent and ask: “What Verisk tools do you have access to?”

Confirm that the expected Verisk tools are returned.

Verisk Underwriting Intelligence can be used in two ways: add it as an action to a specific Chat Agent so it’s available through that agent or invoke it directly in any chat by selecting Verisk Underwriting Intelligence from the specific data and action scope filter.

**Configure PAAS, if applicable**

PAAS requires an additional step depending on how Amazon Quick is being used.

Amazon Quick web

- Add the PAAS instructions provided by Verisk to the custom Chat Agent.
- Attach the Verisk Underwriting Intelligence action.
- Test with a relevant class-code question.

Download the PAAS instructions file: Download

The download includes PAAS/INSTRUCTION.md.

Amazon Quick desktop

- Open Settings → Customize→ Skills.
- Locate the Verisk Underwriting Intelligence Skill package.
- Install the Skills package.
- Test with a relevant class-code question.

**Amazon Quick-specific considerations**

- The same Verisk connection can be used across the Amazon Quick web and desktop experiences.
- PAAS configuration differs between web and desktop.
- Users authenticate with their own Verisk credentials.

# Section 4: User Enablement

Verisk Underwriting Intelligence gives users conversational access to select licensed Verisk content within supported AI assistants, based on their individual entitlements.

It does not replace core.verisk.com or ISOnet. Instead, it gives users another way to access Verisk information, ask questions, and receive sourced responses within their AI assistant.

## Getting the best results

Encourage users to follow these best practices:

- **Be specific.** Include relevant details such as line of business, state or jurisdiction, and classification code when applicable.
- **Review the sources.** When a response informs a filing, rates, compliance, or other important decisions, review the cited Verisk source rather than relying solely on the AI-generated response.
- **Use follow-up questions.** For PAAS responses, suggested follow-up prompts can help users refine or explore their question further.
- **Refine your prompt when needed.** If a response is incomplete or not relevant, add more context and try again.

## Example prompts

The best prompts provide enough context for Verisk Underwriting Intelligence to identify the information the user needs.

**Premium Audit Advisory Service (PAAS)**

- "What's the correct exposure base for class code 91560 in New York?"
- "What is the GL wholesale value concept and when does it apply?"

**Loss Cost Indications**

- "What are the latest ISO Loss Cost indications for commercial property in Illinois?"

**Loss Cost Activity**

- "Show me the loss cost filing history for commercial auto in Indiana."

  **Tip**: Include the line of business, jurisdiction, classification code, or other relevant details whenever possible.

## Why results may differ

Users may not always receive identical results. Differences can occur because:

- **Verisk entitlements vary by user**. Users can only access content included in their individual ISOnet entitlements.
- **AI assistant capabilities may vary**. Available tools and other capabilities can differ depending on the platform or plan being used.
- **AI assistants may interpret questions differently.** The same question may be interpreted,

routed, or summarized differently across supported AI assistants.

## Evaluating responses

Verisk Underwriting Intelligence is designed to help users discover and work with Verisk content more efficiently. Users should still evaluate the information returned before applying it.

When reviewing a response:

- Check the cited source when precision matters.
- Confirm the jurisdiction and effective date apply to the question being researched.
- Consult the underlying PAAS bulletin or classification guide when detailed guidance is required.
- Refine the question if the response is incomplete or off topic by adding the state, line of business, classification code, or other relevant context.
- Contact Verisk Support if cited information appears missing, outdated, or inconsistent with information available through ISOnet or core.verisk.com.

# Section 5: Security & Governance

Verisk Underwriting Intelligence is designed to respect each user's existing Verisk access and entitlements. Authentication occurs through Verisk, while the user's AI assistant provides the conversational experience.

## Authentication and access control

Verisk Underwriting Intelligence uses **OAuth 2.0** to authenticate users.

Users authenticate directly with Verisk using their Verisk credentials and MFA. After authentication, Verisk issues the AI assistant a scoped, time-limited access token. The AI assistant does not receive or store the user’s Verisk password.

## How entitlements are enforced

Access to Verisk content is based on each user's existing Verisk/ISOnet entitlements.

Verisk Underwriting Intelligence does not maintain a separate permission model. If a user does not have access to a particular line of business, product, or jurisdiction through ISOnet, they will not have access to that content through Verisk Underwriting Intelligence.

This remains true even when an agent, plugin, or integration is shared by another user.

**Key Point**: Sharing access to the AI experience does not expand a user's Verisk content entitlements.

## What information is exchanged

When a user asks a question requiring Verisk content:

1. The AI assistant sends the relevant query to Verisk Underwriting Intelligence.
2. Verisk processes the request using the user's authenticated access.
3. Verisk returns the sourced response.
4. The AI assistant presents the response within the user's conversation.

## Data handling and retention

Verisk does not store or retain prompts submitted through the connector.

Queries are also subject to the standard data policies of the AI platform being used:

- Microsoft Copilot: Microsoft data policies
- Claude: Anthropic data policies
- Amazon Quick: AWS data policies

## Governance considerations

Before making Verisk Underwriting Intelligence broadly available, organizations should consider the following:

- **Review user entitlements.** Confirm that existing ISOnet access appropriately reflects the Verisk content users should be able to access.
- **Establish deployment ownership.** Determine who can approve and publish agents, plugins, or integrations for broader organizational use.
- **Review audit requirements.** Evaluate the logging available through the selected AI platform against your organization's requirements.
- **Establish an access-removal process.** Document how connections or authorization should be removed when a user's role or access changes.
- **Follow existing organizational policies.** Apply your organization's established policies for AI use, data handling, access management, and governance.

# Section 6: Support & Troubleshooting

If Verisk Underwriting Intelligence is unavailable or does not return the expected information, use the guidance below to identify and resolve common issues.

## I can’t access Verisk Underwriting Intelligence

If the connector or plugin is unavailable:

- Confirm it has been enabled. An administrator may need to enable Verisk Underwriting Intelligence for your workspace, environment, or account. See Section 2: Requirements & Prerequisites.
- Check your connection. If you are not signed in or your connection has expired, reconnect using the instructions for your platform in Section 3: Platform Configuration.

- Confirm your AI assistant supports the integration. Verify that your plan or subscription supports the required plugins, tools, or connectors.

## Users can't access Verisk content

If users can access Verisk Underwriting Intelligence but cannot access the expected content:

- Check their Verisk entitlements. Access is based on each user's individual Verisk/ISOnet entitlements. See Section 5: Security & Governance.
- Confirm the agent or integration has been shared. Make sure the user has access to the appropriate agent, plugin, or integration.
- Confirm the user has connected their Verisk account. Each user must authenticate using their own Verisk credentials where per-user authentication is required.

## Responses aren't what I expected

If a response is incomplete, irrelevant, or does not appear to use the expected Verisk content:

- Add more detail to your question. Include the line of business, jurisdiction or state, and classification code when applicable.
- Confirm PAAS is configured. For premium audit questions, verify that the additional PAAS configuration described in Section 3 has been completed.
- Consider the scope of available content. Verisk Underwriting Intelligence tools support specific types of Verisk content. See Section 1: Introduction for an overview of currently available content.
- Try refining your question. Add relevant context and submit the question again before escalating the issue.

## Before contacting support

Gather the following information to help troubleshoot the issue:

- AI assistant and experience being used
- Date and time the issue occurred
- Exact question submitted
- Response received or error message
- Screenshot of the issue, if available
- Your Verisk username, but never your password
- Relevant line of business, jurisdiction, and/or classification code
- Whether the issue affects one user or multiple users

## Contact Verisk Support

If you cannot resolve the issue using the troubleshooting steps above, contact your Verisk account representative or use your existing Verisk/ISOnet support channel.

You can also contact Verisk at: https://www.verisk.com/company/contact/