Commercial Lines Download for Applied Epic

Objectives:

1. Understand the download lifecycle.
2. How to implement commercial lines download within your agency.
3. Review ways to make the commercial lines download cycle better.
4. Answer questions about the nuances of commercial lines download.

Commercial Download Lifecycle

- Policy Download

- Interface Configuration
  - ❖ Download Options
    1. Application Detail
    2. Commercial Package vs. Businessowners Application
  - ❖ Status Codes
    1. Types of Business
    2. What level do you want the download to affect- Policy, Line, or Both?
    3. Should download update the premium- Estimated, Annualized, or Both?
    4. Is this information inputted differently for Personal Lines vs. Commercial Lines?

Commercial Download Lifecycle

- NAIC
  - ❖ Issuing Company vs. Premium Payable Codes.

- Company Contracts
  - ❖ Multiple contract numbers with the same carrier.
  - ❖ Different contract numbers per agency location.

- Additional Coverages/Company Unique Coverage Code
  - ❖ Obtain list from carrier for the company unique coverage codes.
  - ❖ Identify where this information downloads to.

Commercial Download Lifecycle

- eDocs & Messages Configuration

- Activity Notes
  - ❖ When configuring the activity codes for these transactions, please take into consideration your current workflows, activity setup, and folder/attachment structure.

Commercial Download Lifecycle

- eDocs & Messages Configuration

- Create Internal eDocs Procedure
  - ❖ Outline what carriers utilizes eDocs.
  - ❖ What transactions/documents does the carrier send via eDocs.
  - ❖ Identify Activity/Transaction Codes.
  - ❖ Naming Conventions for labeling eDocs.

Commercial Download Implementation

- Get buy-in from Upper Management

- Contact Carriers
  - ❖ Determine what the download options are for all departments.

- Utilize the IVANS Exchange Connection
  - ❖ Review to see if your carriers are setup already for commercial download.
  - ❖ Identify your "wants" or "want future" options.

- Create a Download Partners Reference Guide for the service team.
  Download Partners Reference Guide

Commercial Download Implementation

- Develop a project team to begin testing carriers.
  - ❖ Test one or two carriers to start; begin with small commercial.

  - ❖ Prep Work: For those accounts that you do not want to receive download for, turn off the policy download option.

  - ❖ Determine if your agency will utilize the BOP application vs. Commercial Package. If issued on BOP, some carriers will only give the option to download as a BOP. Some carriers let the agency select your option.

Commercial Download Implementation

- Download Concerns:
  - ❖ Not all lines of business download, determine work arounds (i.e. Equipment Floater, D&O, E&O, Crime, etc.) May want to consider utilizing supplemental screens.

  - ❖ Project team reviews download and reports any download concerns.

  - ❖ Address any download concerns directly with IVANS.

Commercial Lines Download for Applied Epic

- Questions?

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