INSURANCE HOUSE AGENCY MANAGEMENT SURVEY

Insurance House (IH) is actively focusing on the agency/company download/upload interface as recommended by ACORD, IIAA, and the PIA. For years, IVANS has been helping the industry squeeze the expense out of insurance transactions by providing end-to-end, managed download solutions using ACORD standards. For additional description and explanation of the benefits of download and upload, see the appendix below.

Please complete this survey at your earliest convenience and fax it to Shannon Brassell at 800.583.1735 or e-mail at sbrassell@insurancehouse.com.

Agency Name: _____

Address: _____

_____

Phone: _____ Fax: _____

Agency Automation Contact: _____

Contact E-Mail Address: _____

Survey Completed By: _____ Broker Code: _____

AGENCY MANAGEMENT SYSTEM

Following are major agency management systems. Only certain versions of management systems are capable of accepting data download from the company and sending upload. Please indicate the agency management system and the version of the system your agency uses.

☐ I do not have an agency management system.

AGENCY SOLUTION
☐ Silver v. _____
☐ Agency Solution v. _____

AGENCY ADVANTAGE
☐ Agency Advantage v. _____

AMS
☐ AMS for Windows (AFW) v. _____
☐ Prime v. _____
☐ Sagitta v. _____
☐ 360 v. _____

HAWKSOFT
☐ Hawksoft v. _____

INSTAR
☐ InStar v. _____

IRS-AIMS
☐ Magic-AIMS v. _____
☐ MARS v. _____

JENESIS
☐ Jenesis v. _____

APPLIED SYSTEMS
☐ The Agency Manager (TAM) v. _____
☐ Vision v. _____
☐ DORIS v. _____

MI ASSISTANT SOFTWARE
☐ MI Assistant v. _____

ASSURANCE SYSTEMS
☐ AccuAuto v. _____

CAIR SOFTWARE
☐ CAIR v. _____
☐ Evolution v. _____

EBIX
☐ EBIX.One v. _____
☐ Elite v. _____

NASA
☐ Eclipse v. _____

SIS
☐ SEMCI Partner v. _____

QUICKQUOTE
☐ QuickFile v. _____

☐ **OTHER** (Please provide Vendor, Product, and Version)

AGENCY MANAGEMENT SYSTEM COMMUNICATION SOFTWARE

In addition to a specific version, the agency management systems listed may require special software to activate the ability to accept download and send upload. To receive data from any insurance company, you must have this software. Please verify if you currently have software or will obtain software from your vendor to achieve download/upload with Insurance House.

☐ I am unaware of the software used for communications within my management system.
(Please describe your agency system setup, if any, on the reverse side of this page.)
☐ My management system uses Transfer Manager for communications.
☐ My management system uses Expedite for communications.
☐ I do have the download software from my vendor.
☐ I do have the APT or FIM Module from my vendor for upload.

CURRENT INTERFACE ACTIVITY

If you are currently exchanging download or upload with other insurance companies, please indicate which companies and/or your IVANS mailbox ID.

IVANS Mailbox ID (Y-Account): _____   User ID: _____

Destination Address: IBM _____

We are currently receiving download from the following companies:

_____

_____

_____

We are currently receiving download of Direct Bill Commission Statements from the following companies:

_____

_____

We are currently sending upload to the following companies: If through Transformation Station, please indicate "TS" next the name.

_____

_____

IH will download to the following agency systems in NC and SC. There may be systems added in the future.
> *AMS: AMS for Windows (AfW), 360, Prime, Sagitta, InStar*
> *Applied Systems: The Agency Manager (TAM), DORIS, Vision*
> *Jenesis, Agency Advantage, QuickQuote Quickfile, Agency Technologies Agency Profiler*

If you use one of these systems, do you want to start download from IH (SGIC)?	**YES**	**NO**

Explanation

DEFINITION OF DOWNLOAD AND UPLOAD
Download and Upload are generic terms in the insurance and computer industry which have taken on many meanings.

Within the insurance industry's interface context, download is most often used as a synonym for "batch-back." Data contained in Insurance House's computer(s) is transmitted to the agency computer to update the agency database.

Upload is sometimes referred to as "batch-in." It is the reverse of Download. Data entered into the agency computer is sometimes edited through software incorporated into your agency computer system, such as the WebSEMCI software or the Applied Systems Forms/Interface Module. The data is then transmitted to Insurance House's computer for processing through the policy writing system to rate the policy and issue the declarations.

BENEFITS OF DOWNLOAD
- Eliminates redundant data entry for your agency by allowing all new business, renewals, endorsements, and cancellations/reinstatements from Insurance House to automatically update your database on an ongoing basis.
- Matches your agency's database to the Insurance House database providing more accurate information while preserving the integrity of your agency data.
- Proven way for agencies to quickly, efficiently, and accurately build a policy data base. This is accomplished by daily additions of new business, renewals, endorsements and cancellations/reinstatements to your agency file as these transactions occur from the Insurance House host system.

BENEFITS OF UPLOAD
- As with download, upload also eliminates redundant data entry for your agency by allowing one system to be used for many insurance companies. There is no need for the agency to maintain separate computer systems for each insurance company you do business with.
- Reduces training time and expense as well as reducing cost of mailing paper applications. Agency personnel need only be trained on one system.
- Data is more accurate since the agency system is the original source of the new business data. Sending the data to Insurance House directly from the source reduces subsequent phone calls to verify incorrect or missing data later. Policy issuance occurs more quickly.

CHALLENGES
- For your agency to take advantage of the data download/upload company interface, you must first have an agency management system that is capable of receiving data that Insurance House has formatted into the industry standard ACORD Automation Level III (AL3) format and sending data in the same format.
- Secondly, your agency system must be able to connect to the mailbox, either on the IVANS Ecommerce Server (ECS) or via the IBM Information Exchange (IE), using communications software, such as IVANS Transfer Manager or Expedite.
- Currently, many transactions are being exchanged between carrier and agency in "real time" using IVANS Transformation Station, which is supported by many of the agency management systems.

SUMMARY
This survey will help Insurance House better understand the current automation environment of your agency. The results of this survey will help to establish an implementation schedule by vendor and to better serve your agency and the insured. Thanks for your assistance in completing this survey.