



## Download Requests and IVANS® Change Requests

Agency Name: \_\_\_\_\_

Agency Code(s): \_\_\_\_\_

Agency Contact Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**For all requests, please provide us with this additional information about your agency:**

Management System: \_\_\_\_\_ Version: \_\_\_\_\_

IVANS Y Account: \_\_\_\_\_ User ID/Mailbox: \_\_\_\_\_ 110 Machine: \_\_\_\_\_  
Only required for agents with a participant code

**Check box if Management System or IVANS Account changed:**     Management System     IVANS

**Please check the appropriate boxes below for new download setup:** (see pages 2-4 for information on each option)

### Commercial Options

Multi-year     Annual (you must choose one)

Commercial Package Download

Crime/Inland Marine Download

Work Comp Download

eDOCs – Policy PDFs

Include Reapplied Transactions

Auto ID Cards as a Separate PDF

eDOCs – DNOC & Rescission PDFs

eMessage only:

DNOC & Rescissions

New Business

Policy Change

Renewal

Reinstatement

Rewrite

Cancellation

Premium Audit

Anniversary Review

### Small Business Options

BOP Download

BOP eDOCs

Work Comp Download

Work Comp eDOCs

Auto Download

Auto eDOCs

Umbrella Download

Umbrella eDOCs

### Customer Care Only Options

Customer Care Package

Work Comp

Crime/Inland Marine

Small Business

BOP     Auto     Work Comp     Umbrella

### Personal Options

Personal Lines Download

eDOCs – Policy PDFs

Auto and Watercraft ID Cards as a Separate PDF

eDOCs – DNOC & Rescission PDFs

eMessage only – DNOC & Rescissions

### Claims Options

Claims

eMessages – New Claims and Payments

### Direct Bill Commission Options

Direct Bill Commission

Annual term

Exclude CSU

eDOC – Direct Bill Commission Report

PDF format

Excel format

Both PDF & Excel

Exclude CSU report

### Initial Load Options

Commercial Package     Personal Lines

Please return completed form to [Customer\\_Support@cinfin.com](mailto:Customer_Support@cinfin.com)

**If you have not already done so, please help us maintain accuracy by setting up these NAIC codes in your agency's management system:**

- 10677 – The Cincinnati Insurance Companies
- 28665 – The Cincinnati Casualty Company
- 23280 – The Cincinnati Indemnity Company
- 13037 – The Cincinnati Specialty Underwriters Insurance Company

Cincinnati's Origination Address: IBM513BWCSYS

**To find your agency's IVANS information:**

- Go to IVANS Exchange <https://ice.IVANSinsurance.com/Account/LogOn>
- From the agency Dashboard look in the upper righthand corner for the Menu button (looks like 3 parallel bars).
- Click on the Menu button and select the option "Agency Profile"
- That will bring you to a new page with several tabs, the last of which is "Mailbox Setup"
- All of your agency's account information will be listed there.

**Term Options: Multi-Year or Annual:** One of these options **must** be selected if you are getting policy download. This option will apply to Commercial Package download, Small Business download, and Customer Care Only download.

Preferred download method for receiving policies	Select this option
Receive auto policies as separate policy sections – for Package only	Multi-Year
Receive renewals as a reminder to follow up with your clients	Annual
Generate updated premiums	Annual

**Multi-Year Option:**

Multi-year policies are downloaded with the actual multi-year term. The annual premium is downloaded at the beginning of the renewal or new business term. With this option, it is your agency's responsibility to post the anniversary premium. We'll complete an anniversary review if the policy contains professional coverage. If there is a rate change associated with the review, you will receive a Policy Change (PCH) transaction with a credit or debit net change premium. For package download, all auto policies are downloaded as a separate policy section with an EBA prefix because auto premiums are re-rated annually.

*Example: A renewal or new business with a November 11, 2022, effective date and November 11, 2025, expiration date; endorsements will show the endorsement effective date and expire on November 11, 2025. If this policy had auto, it would download with an EBA prefix with the effective date of November 11, 2022, expiring on November 11, 2023.*

**Annual Option:**

Each multi-year policy is downloaded as a one-year policy term. On each anniversary, you will receive a renewal that changes the date to the next one-year term. The auto section is included with the package download. Because premiums are downloaded with each endorsement, your manual upkeep is reduced. **Please note:** when preparing documents (such as Certificates of Insurance or Evidence of Property Insurance), you are responsible for changing the expiration date to the true three-year expiration date of the policy.

*Example: A renewal or new business with a November 11, 2022, effective date and a November 11, 2023, expiration date, the download will include comments that indicate the policy is a three-year policy with the actual effective date of November 11, 2022, and the actual expiration date of November 11, 2025.*

*Ninety days prior to the anniversary date, we will send your agency the download for the next term. In this example, the download is for the term November 11, 2022, with an expiration date of November 11, 2023. This is a download only – no physical paper copy is generated or sent to your agency or to your client.*

**Commercial Package Download:** Policies, renewals, endorsements, and audits for all package and small business policies in e-CLAS will be downloaded. The Multi-Year or Annual term selected will determine how policies will download. By selecting this option, all policy data will be downloaded, **including those policies handled by our Customer Care Center.** CSU policies will not download at this time.

**Crime/Inland Marine:** By selecting this option, Crime and Inland Marine will download as a separate line of business. If this option is not selected, Crime and Inland Marine coverages will be included with the property line of business. You must have package download in order to have Crime/Inland Marine download. All data from policies issued in e-CLAS will be downloaded, including those policies handled by our Customer Care Center.

**Workers' Compensation:** Policies, renewals, endorsements, and audits for all Worker Compensation policies issued in e-CLAS will download. By selecting this option, all policy data will be downloaded, including those policies handled by our Customer Care Center.

**CL eDOCs – Policy PDFs:** PDFs of all e-CLAS policies, renewals, endorsements, and audits will download. Commission sheets are sent in a separate PDF (sent as MEM transaction) for all New Business, Renewals, and Anniversary Reviews. CSU policies are not sent as eDOCs.

**CL eDOCs – Include Reapplied Transactions:** CL eDOC download does not include Reapplied Transactions. Reapplied transactions are those renewals, endorsements, or audits that are regenerated due to an out of sequence transaction being processed. Selecting this option will send the eDOCs of the new reapplied documents. Rollback transactions will not be sent.

**CL eDOCs – Auto ID Cards:** Auto ID cards are always included in the policy PDF of the eDOC download. By selecting this option, you will get the ID card twice, once with the policy PDF and once in a separate PDF that contains only the ID cards. This will require a change in your Agency Management System to support the new eDOC type POL (Policy Unspecified).

**CL eDOCs – DNOC & Rescission PDFs:** PDFs of all Commercial non-pay cancellation notices and rescissions will download. CSU non-pay cancellations and rescissions will download as well.

**CL eMessages only:** Only Alerts (eMessage) will be sent. If you are already getting eDocs, this would be a duplication of those transactions without the PDF attached. You must request the transactions you want an alert for: New Business (NBS), Policy Change (PCH), Renewal (RWL), Reinstatement (REI), Rewrite (REW), Anniversary Review (ARR), Premium Audit (PRMAU), Cancellation (XLC), DNOC (XLP) and Rescissions (REI).

**Small Business BOP, Auto, Workers Compensation, and Umbrella:** Policies, renewals, endorsements, and audits for all policies in eVolve will be downloaded. By selecting this option, all policy data will be downloaded, **including those policies handled by our Customer Care Center.** You need to make sure your Agency Management system is setup to handle BOP policies.

**Small Business eDOCs – Policy PDFs:** PDFs of all eVolve policies, renewals, endorsements, and audits will download. For small business, you do have the granularity to pick which lines of business you want eDOCs for: BOP, Work Comp, Auto, or Umbrella.

**Customer Care Only Package:** Select this option if your agency uses our Customer Care Center to maintain your book of business and you would like to get the policy data download **ONLY** for those policies that are flagged in e-CLAS as Customer Care. The Multi-Year or Annual term selected will determine how the policy will download. You can receive Policy PDFs and eMessages for Customer Care policies by selecting the appropriate eDOC options under the Commercial Package section. If you want both Customer Care and all other policies not in Customer Care to download, **only** select the Commercial Package Download option.

**Customer Care Workers' Compensation:** Only workers' compensation policies that are maintained by our Customer Care Center will download.

**Customer Care Crime/Inland Marine:** By selecting this option, Crime and Inland Marine will download as a separate line of business. If this option is not selected, Crime and Inland Marine coverages will be included with the property line of business. You must have Customer Care Only Package download in order to have Crime/Inland Marine download.

**Customer Care Small Business BOP, Auto, Workers Compensation, and Umbrella:** Only Small Business policies that are maintained by our Customer Care Center will download. You need to make sure your Agency Management system is setup to handle BOP policies.

**Personal Lines Download:** All policies, renewals, and endorsements issued in Diamond will download.

**PL eDOCs – Policy PDFs:** PDFs of all Diamond policies, renewals, and endorsements will download.

**PL eDOCs – Auto and Watercraft ID Cards:** Auto and Watercraft ID Cards are always included in the policy PDF of the eDOC download. By requesting this option, you will get the ID card twice, once with the policy PDF and once in a separate PDF that contains only the ID cards. This will require a change in your Agency Management System to support the new eDOC type POL (Policy Unspecified).

**PL eDOCs – DNOC & Rescission PDFs:** PDFs of all Personal non-pay cancellation notices and rescissions will download.

**PL eMessages only – DNOC & Rescissions:** Only Alerts (eMessage) will be sent for all Personal DNOCs or Rescissions. These are sent without the PDF attached.

**Claims Download:** New claims, reopened/closed claims, and claim payments for both Personal and Commercial policies will download. If you selected Annual as the policy term option, claims will download with the annual policy effective/expiration dates.

**eMessages Only – New Claims and Payments:** Alerts (eMessage) will be sent for all new claims and claim payments for both Personal and Commercial policies.

**Direct Bill Commission Download:** Monthly download will be sent which includes commissions for all lines of business written with Cincinnati Insurance (both Personal and Commercial). This download does include transactions for Cincinnati Specialty Underwriters. Commercial policies will download commissions based on the Multi-Year or Annual option as selected for Package download. If the Multi-Year option is selected, the commissions will download for the entire 3-year term.

**Annual Term:** Select this option if you want all commissions to download as a one-year term. If you are currently receiving Commercial Package Download as Annual, then your commissions are already downloading as the annual term. If you are currently receiving Commercial Package Download as Multi-year, select this option so the commissions will download on a one-year term.

**Exclude CSU:** Select this option if you do not want CSU transactions to download with the commissions.

**e-DOC – Direct Bill Commission Report:** A PDF or Excel document of the monthly DB Commission report will be sent at the same time the DB Commission download is sent. You must select which format you would like to receive this report: PDF, Excel, or Both. For agencies with multiple agency codes, a separate report will be sent for each code.

**Exclude CSU Report:** The CSU DB Commission report will automatically be sent along with the CIC report unless this option is selected.

**Initial Loads:**

- An initial load sends the last active image of all the policies we currently have with your agency.
- Your agency would normally get an initial load if you are new to download or you switched from one management system to another. This would download all policies to bring your system up to date with all policy coverages.
- Initial loads are offered for Personal and Commercial lines policies.
- Initial load transactions are sent as SYN transactions. SYN means it's a sync transaction.
- The initial load is ONLY for policy data. Initial loads cannot be done for Claims or eDocs.
- Initial loads do NOT update the billing screens. It only downloads the policy limits and coverages.
- If the last transaction/image is a Reapplied with no premium difference, it will not be included in an initial load.
- We currently do not offer initial loads for small business policies.

**For more information, please contact Cincinnati's IT Customer Support Team, 866-513-1133, or locally, 513-870-2255.**