



# Agency Automation Tools and Resources

More Online, In Less Time



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## **Agent Notice**

This presentation is general in nature. Every agent and broker is responsible for knowing the guidelines and laws that govern the business of insurance in the states where they are licensed. If any statement in this training conflicts with the policy language it describes, the policy language prevails.

## **Antitrust Statement**

The purpose of this training is for Liberty Mutual Insurance to share helpful information with insurance agents and brokers. It is imperative that participants avoid any discussions, including informal conversations, which may violate antitrust laws on topics such as pricing, promotional policies, market allocation, supplier costs, conduct that could be construed as boycott, and any company-specific trends, expenses, or profit. You should consult your legal counsel if you have any questions regarding antitrust laws.

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# More Online, In Less Time!

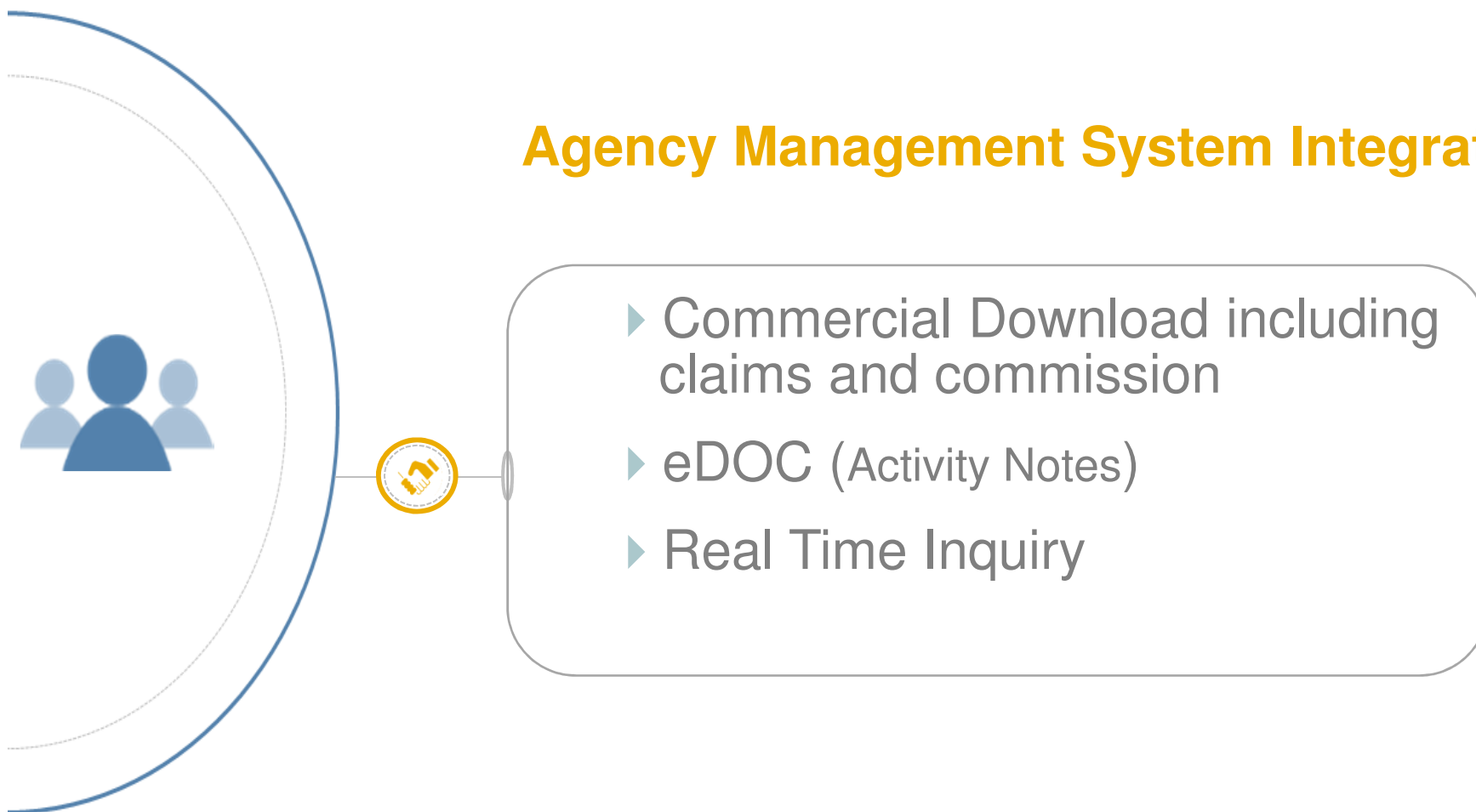
## Agents' Portal Tools and Resources

Our Agents' Portal is the secure path to find what you need quickly, at any time. A few of the tools available to you on the Agents' Portal are:

- Online quoting — eCLIQ® quoting and submission for new business
- Risk prequalification — SmartNav™ online appetite guide and product selection tool
- Recent activity — online viewing for billing, claims, and policy activity
- Email notifications — daily notices for billing, claims, and policy activity
- Print preferences — set up or suppress policy delivery of agency and policyholder copies
- Manage Download—enroll to receive download, manage existing download, and resend policies.
- Billing — make payments, electronic bill copies, and direct bill commission statements
- Claims — claims inquiries and loss runs
- Agency information — production reports and other agency financial information
- Agent resources — Agent Learning Center, virtual CE classes, CSR and producer school programs, eCLIQ Agent Playbook
- Marketing resources — co-branded brochures, ads, and logo usage

# Liberty Mutual Tools and Resources

## Agency Management System Integration



# Agency Management System Integration

**Download** – An electronic transmission of insurance transactions in ACORD compliant format from Liberty Mutual to your Agency Management system.

Our goal is to make working with Liberty Mutual as seamless as possible. That's why we offer download that's compatible with more than 35 agency management systems.

## Benefits of Download:

- Save time and money
- Increase data accuracy
- Reduce E&O exposure
- More time for service and sales

**60** Minutes  
**Per Employee/Per Day**

Real Time/Download Campaign 2013 Agency & Brokerage Technology Survey

## Available Lines of Business:

- Business Auto
- BOP
- Custom Protector
- Package
- Property
- Liability
- Umbrella
- Workers Comp
- Commission
- Claims

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# Paperless Policy Delivery

## Activity Notifications

- Is your agency scanning paper policies or manually pulling policies from carriers' sites?
- Receiving this information as part of your daily download means you can access all your important information without having to log into a separate system.

Activity Notifications allows your agency management system to receive PDF copies of policies, certain billing notices, and claims updates. It's simple and convenient—a real time-saver.

## How Activity Notes Work:

1. Start by setting up your Agency Management System to receive Activity Notes.
2. Enroll with Liberty Mutual via the Agents' Portal through Policy Delivery Preferences
3. Receive Activity Notes via batch transmission (nightly update).

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## Getting Started with Download

Take a look at the Download Manual available on the Agents' Portal and see exactly what data is sent in download:

- Go to the 'Agency Administration Tab'
- Select 'Interface References'
- Click on 'Download Manual'

### Enroll in Download Today!

- Go to the Agents' Portal
- Select the 'Agency Administration' tab
- Click on 'Download Registration and Resend'



# IVANS Connection Report

Receive a customized report for your agency that includes:

- All of the carriers you are currently receiving download
  - Additional products available that you are not receiving in download
- **DL** = Lines of business currently being downloaded
  - **A** = Lines of business that can be downloaded by at least one carrier

ABC Agency, Inc.	Activity Notes	Claims	Direct Bill Comm	BOP	Comm Package	Liability CL	Property CL	Auto CL	Umbrella CL	Work Comp	Package PL	Auto PL	Motorcycle	HOME	Dwelling Fire	Inland Marine PL	BOAT	Earthquake	FLOOD	Umbrella PL
Carrier 1	DL	A	A	DL	A	A	A	A	A	A	DL	DL	A	DL	DL	A	A	A	A	DL
Carrier 2	A	A	A								DL	DL		DL	DL		A			DL
Carrier 3		DL	A								DL	DL		DL	DL		A			DL
Carrier 4		DL	A								DL	DL		DL	DL					DL
Carrier 5		DL	DL	DL	DL	DL	A	A	DL	DL	DL	DL	DL	DL	DL	DL	DL	DL	DL	DL
Carrier 6		DL	DL	DL	DL	A	A	A	DL	DL	DL	DL	A	DL	DL	A	DL	A	A	DL
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Carrier 9		DL	DL	DL	DL	DL	A	A	DL	DL	DL	A	DL	A	A	DL	A	DL	DL	A
Carrier 10		DL	DL	DL				A		A		DL		DL	A		A			
Carrier 11		DL	DL	DL	DL	A	A	A	A	A	DL	DL	A	DL	DL	A	DL	A	A	DL
Carrier 12		DL	A	DL	DL						DL	DL		DL	DL		DL			DL
Carrier 13		DL	A	DL	DL						DL	DL		DL	DL					DL
Carrier 14		A	DL	DL	DL	A	A	A	A	A	DL	DL	A	DL	DL	A	DL	A	A	DL
Carrier 15		A	A	A	DL			A	A	A	DL	DL		DL	DL		A			A
Carrier 16	A	DL	A								DL	DL		DL	DL		DL			DL

Request online: [www.Ivansinsurance.com/connectionsreport](http://www.Ivansinsurance.com/connectionsreport)



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# Agency Management System Integration

## Real Time

Real Time is the ability to click a button within your agency management system to interact with carriers for quoting, billing inquiry, claims inquiry/loss runs, and conduct other transactions.

### Benefits of Real Time:

- Streamlined workflow
- Eliminates duplicate entry
- Reduces E&O exposure
- More time for service and sales

### Available Real Time Transactions:

- Billing Inquiry/Make a Payment
- Claims Inquiry/Loss Runs
- Policy View
- Carrier Web Site Sign-On



**53**

**Minutes**

**Per Employee/Per Day**

Real Time/Download Campaign 2013 Agency & Brokerage  
Technology Survey

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## Getting Started with Real Time

Confirm if you have Real Time setup in your agency management system. If you are not sure, contact your system vendor.

### Applied Systems:

- Add Liberty Mutual as a 'Company'
- Run the Account Update Wizard and add the Liberty Mutual Real Time products.
- Add your Liberty Mutual username and password to local securities.

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## Wrap up

- Order your IVANS Connection Report by going to [www.lvansinsurance.com/connectionsreport](http://www.lvansinsurance.com/connectionsreport)
- Sign-up for Download and Real Time
- Sign-up for eDOCS Download

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Thank You for your time today!