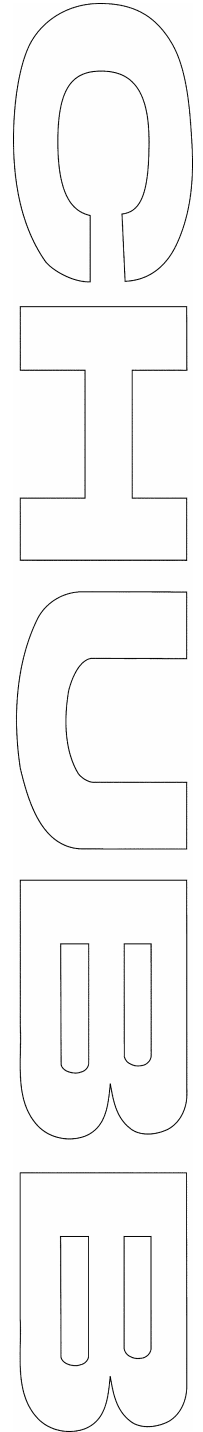




Agency

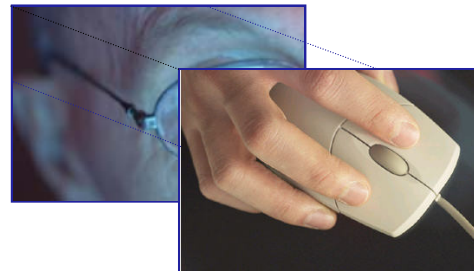
Administrator

User's Guide



Chubb Group of Insurance Companies
Warren, New Jersey 07059
<http://www.chubb.com>

form 21-10-0625 (Rev 11/08)



Special Notes: Defining Agency Preference (Personal Lines Only)

Introduction

Completing this section of the enrollment system allows Chubb to send information that you want to see at the location you want to receive it. In addition, it may allow Chubb to co-brand our online services with you agency providing seamless customer service to your clients.

The following information is completed (if available) about your agency:

- Email address
- Web site address
- Logo
- Communication preferences (kinds of Chubb communications desired)
- Email address from communications

Obtaining Help

A confirmation is required after each address to ensure accuracy. If you have any problems accessing or using **@chubb**, please contact us at:

Personal Lines
Chubb Customer Care Team
1-866-324-8222
Email: customercare@chubb.com

Commercial Lines
Call eBusiness Help Desk
1-877-747-5266
Email: atchubb-support@chubb.com

Access

What does the @chubb platform allow agency employees to access?

Everyone has access to:

- √ Claims CheckView
- √ Claims Details Inquiry
- √ Loss Scenarios
- √ Chubb News
- √ Preferred Vendor Network

Personal Lines Agents have access to:

1. Personal Lines Agent/CSR

- √ CPI Banner Ad
- √ Download Central
- √ Masterpiece Manuals
- √ PL Agent Connection
- √ PL Policy Transactions
- √ “Masterpiece Real-Time”
- √ PL Policy Activity “My Alerts”
- √ My Policies

2. Personal Lines Agent Leader

- √ CPI Banner Ad
- √ Download Central
- √ Masterpiece Manuals
- √ Monthly Commission Summaries
- √ My Policies
- √ PI Policy Transactions
- √ “Masterpiece Real-Time”
- √ PL Agent Connection
- √ PL Policy Activity “My Alerts”

Commercial Agents have access to:

- √ Builders Risk
- √ Cargo Certificate Issuance
- √ Commercial Property Valuation
- √ Business Direct Bill
- √ Business Loss Runs
- √ Business PolicyView
- √ Contractors’ Equipment Express
- √ Customarq Classic Policy Forms
- √ EPL Loss Prevention Services
- √ Life Sciences Forms
- √ Life Sciences Wizard
- √ Technology E&O Application “SMART App”

Commercial Lines Agent Leader have access to:

- √ Builders Risk
- √ Cargo Certificate Issuance
- √ Commercial Property Valuation
- √ Business Direct Bill
- √ Business Loss Runs
- √ Business PolicyView
- √ Contractors’ Equipment Express
- √ Customarq Classic Policy Forms
- √ EPL Loss Prevention Services
- √ Life Sciences Forms
- √ Life Sciences Wizard
- √ Monthly Commission Summaries
- √ Technology E&O Application “SMART App”

Accounting Specialist have access to:

- √ Commercial Direct Bill
- √ Direct Deposit of Commissions
- √ Commercial/Personal Monthly Commission Summaries
- √ Business Policy View
- √ My Policies

Agency Licensing Contacts have access to:

- √ Producer Appointment Express

Agency Principals have access to:

- All products included in the Personal Lines Agent Leader
- All products included in the Commercial Lines Agent Leader
- All products included in the Accounting Specialist role

Introduction

A User ID and Password are necessary in order for any individual to access the @chubb platform. You request this through Chubb's Online Enrollment System. It's easy and it's fast. The following procedure and step-by-step detail tells you how it is done.

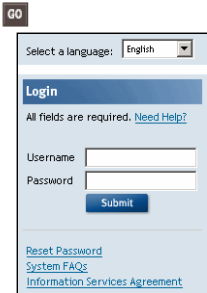
How to Login

1. Open Internet Explorer and type:
www.chubb.com

2. Click 

The @chubb login window displays.

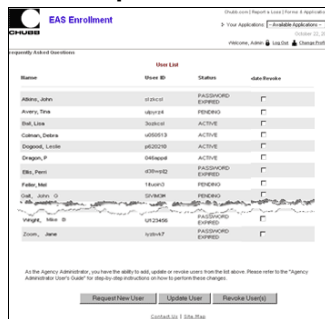
3. Type your User ID and Password in the fields provided and click



The main window displays.

4. Click **Administer a Chubb System**.
5. Click **Administer Access to @chubb**.
6. The **Request New User, Update User or Revoke User(s)** window displays. (See buttons at the bottom of the page)

Click **Request New User, Update User or Revoke User(s)**.



See specific procedures for each in the remainder of this booklet.

Revoking a User(s)

If you want to know about

- Revoking
- Why you would want to revoke a user
- How to revoke a user(s)

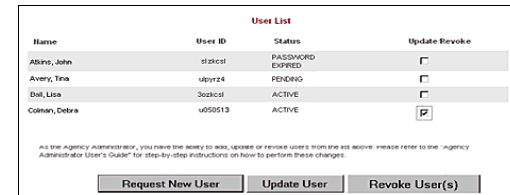
Introduction

Revoking a user(s) means that you no longer want this person to have access to the Chubb tools. There are many reasons for revoking someone. For example, the person has left the agency, or been given other responsibilities, etc. Regardless of the reason, the process for revoking a user is the same.

Revoking a User(s) Procedures


STEP 1

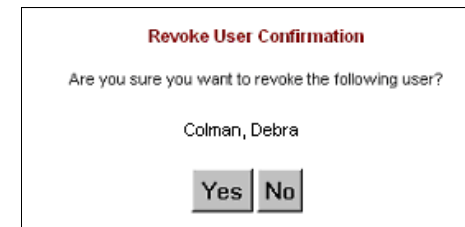
Click the **Update/Revoke** column and put a (check mark) in the box to the right of the user who requires updating.



Name	User ID	Status	Update/Revoke
Adkins, John	st0001	PASSWORD EXPIRED	<input type="checkbox"/>
Avery, Tina	v00024	PENDING	<input type="checkbox"/>
Bull, Lisa	l00001	ACTIVE	<input type="checkbox"/>
Colman, Debra	v00013	ACTIVE	<input checked="" type="checkbox"/>

STEP 2

Click 
The following **Revoke User Confirmation** message displays.



Revoke User Confirmation

Are you sure you want to revoke the following user?

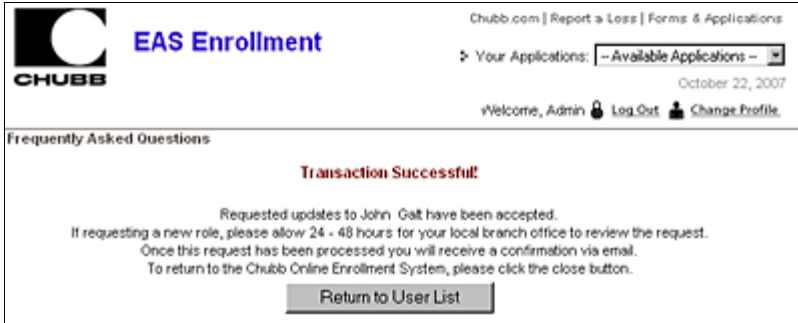
Colman, Debra

STEP 3

Click 
The **User List** displays.

Updating a User Procedure

- STEP 6 Click **Update User**
The **Transaction Successful** message displays.



The screenshot shows the Chubb EAS Enrollment interface. At the top, it says 'Chubb.com | Report a Loss | Forms & Applications'. Below that, 'EAS Enrollment' is prominently displayed. A navigation bar includes 'Your Applications: -- Available Applications --', the date 'October 22, 2007', and user options 'Welcome, Admin', 'Log Out', and 'Change Profile'. A 'Frequently Asked Questions' section is visible on the left. The main content area features a red 'Transaction Successful!' message: 'Requested updates to John Galt have been accepted. If requesting a new role, please allow 24 - 48 hours for your local branch office to review the request. Once this request has been processed you will receive a confirmation via email. To return to the Chubb Online Enrollment System, please click the close button.' A 'Return to User List' button is located at the bottom of the message.

Click **Return to User List**.

A list of users including the one updated displays.

Procedures for Requesting a New User

- STEP 1 Click **Request New User**
The **Request for New Account** window displays.

New User Information Steps 2 - 7



The screenshot shows the 'Request for New Account' form in the Chubb EAS Enrollment system. The form is titled 'Request for New Account' and includes a 'Request New User' button. Below the title, there is a section for 'Please complete the information below. *Required information'. The form fields include: 'First Name', 'Last Name', 'Email Address', 'Confirm Email', 'Business City', and 'Business State'. Each field has a corresponding input box. A 'Request New User' button is located at the bottom right of the form.

- STEP 2 Click **First Name** field and type the user's first name.
Maximum is 20 characters.
- STEP 3 Click **Last Name** field and type the user's last name.
Maximum is 20 characters.
- STEP 4 Click **Email Address** field and type the user's email address.
TIP: This is a required field and must be completed.
- STEP 5 Click **Confirm Email** field and type the same Email address again.
- STEP 6 **Business City**
Click **Business City** field and type the user's business city. Maximum is 20 characters.
- STEP 7 **Business State**
Click **Business State** field and type the user's business state. Maximum is 20 characters.

Procedures for Requesting a New User

STEP 8 Role Description

Click the **Assign** column and put a (check mark) in the box to the right of the **Role** the user desires. Minimum is one role or access (or one check mark).

Role Description Step 8 →

Please select one or more user roles (only one PL role and/or one Commercial role).

Available User Roles	Assign
Accounting Specialist	<input type="checkbox"/>
Agency Licensing Contact	<input type="checkbox"/>
Agency Principal	<input type="checkbox"/>
CSI MRA Agent	<input type="checkbox"/>
Commercial Agent - Leader	<input type="checkbox"/>
Commercial Agent	<input type="checkbox"/>
PL Agent CSR	<input type="checkbox"/>
PL Agent Leader	<input type="checkbox"/>

For detail description of the above roles, please click [ROLE DESCRIPTION](#)

STEP 9 Select Producer Numbers

Click the **Assign** column and put a (check mark) in the box of the **Producer Number** the user desires. At least one **Producer Number** must be selected. You may select "**All**" to select all producer numbers or "**None**" to clear all checkboxes. To "unselect" a producer code, simply click in the checkbox already checked.

Producer Number Information Step 9 →

To "unselect" a producer code, simply click in the checkbox.

Producer No.	Agency Name	City	State	Branch	Assign
123456-00	ABC INSURANCE	WARREN	NJ	AA	<input type="checkbox"/>
987654-09	DURHAM ASSOC.	MIAMI	FL	ZZ	<input checked="" type="checkbox"/>
224466-11	JONES INC.	NEW YORK	NY	JJ	<input checked="" type="checkbox"/>
232323-00	BUDDY SAMUELS	WESTFIELD	NJ	BS	<input checked="" type="checkbox"/>
555555-13	SMITH AND SONS	COLUMBUS	OH	XX	<input type="checkbox"/>

Create User Cancel

Tips:

Multiple Personal Lines roles cannot be selected for the same person.

Clicking [ROLE DESCRIPTION](#) provides an online description of each role. This can help you decide which role(s) to assign a new user.

Updating a User Procedure

STEP 3 DETERMINE...

If you are	Then
Changing/adding Roles	Proceed to Step 4

Changing/adding Producer Code Numbers	Proceed to Step 5
---------------------------------------	-------------------

STEP 4 DETERMINE...

If you are	Then
Adding a Role	Click the box in the Assigned column that is associated with the desired role, a <input checked="" type="checkbox"/> (check mark) displays in the box. Proceed to Step 6.

Deleting an existing Role	Click the existing <input checked="" type="checkbox"/> (check mark) in the Assigned column associated with the Role to be deleted. Proceed to Step 6.
---------------------------	--

STEP 5 DETERMINE...

If you are	Then
Adding a Producer Code Number	Click the box in the Assigned column that is associated with the desired Producer Code Number, a <input checked="" type="checkbox"/> (check mark) displays in the box. Proceed to Step 6.

Deleting an existing Producer Code Number	Click the existing <input checked="" type="checkbox"/> (check mark) in the Assigned column associated with the Producer Code Number to be deleted. Proceed to Step 6.
---	--

Updating a User Procedure

STEP 1 Click the **Update/Revoke** column and put a (check mark) in the box to the right of the user who requires updating.

User List			
Name	User ID	Status	Update/Revoke
Adams, John	u46123	PASSWORD EXPIRED	<input type="checkbox"/>
Avery, Tina	u4pyr24	PENDING	<input type="checkbox"/>
Bell, Lisa	3ozkcs1	ACTIVE	<input type="checkbox"/>
Colman, Debra	u050513	ACTIVE	<input checked="" type="checkbox"/>

As the Agency Administrator, you have the ability to add, update or revoke users from the list above. Please refer to the "Agency Administrator User's Guide" for step-by-step instructions on how to perform these changes.

Request New User Update User Revoke User(s)

STEP 2 Click **Update User**
The **Update User** window displays for the selected person.

User selected for update

Please review and make changes as needed.

User Information

First Name: Debra Colman MI: G
 Last Name: Colman
 City: Anytown
 State: CO

* - indicates a required field.

Role Description See Step 4

Update user roles (only one PL role and/or one Commercial role):

User Roles	Assign
Accounting Specialist	<input type="checkbox"/>
Agency Licensing Contact	<input type="checkbox"/>
Agency Principal	<input type="checkbox"/>
Commercial Agent - Leader	<input type="checkbox"/>
Commercial Agent	<input type="checkbox"/>
PL Agent CSR	<input type="checkbox"/>
PL Agent Leader	<input checked="" type="checkbox"/>

For detail description of the above roles, please click [ROLE DESCRIPTION](#)

Producer Code Number See Step 5

To "unselect" a producer code, simply click in the checkbox.

Producer No.	Agency Name	City	State	Branch	Assign
123456-00	ABC INSURANCE	WARREN	NJ	AA	<input type="checkbox"/>
987654-99	DURHAM ASSOC.	MIAMI	FL	ZZ	<input checked="" type="checkbox"/>
224455-11	JONES INC.	NEW YORK	NY	JJ	<input type="checkbox"/>
232323-00	BUDDY SAMUELS	WESTFIELD	NJ	BS	<input checked="" type="checkbox"/>
555555-13	SMITH AND SONS	COLUMBUS	OH	XX	<input type="checkbox"/>

Create User Cancel

Procedures for Requesting a New User

STEP 10 Click **Create User**

CHUBB EAS Enrollment

Transaction Successful

Request for a new user (John Galt) has been accepted. Please allow 24-48 hours for your local branch office to view this request.

Once this request has been processed, you will receive notification with further instructions. To return to the Chubb Online Enrollment System please click the close button.

Return to User List

Click **Return to User List** to display a list of users including the one just added.

NEXT STEPS

Within two business days, you will receive an email from the branch containing the user ID for the requested user. The new user will receive a separate email with their new password.

Note: As the administrator, you can see a list of your individual users and the status of a recent request on the main menu page.

CHUBB EAS Enrollment

Transaction Successful

Request for a new user (John Galt) has been accepted. Please allow 24-48 hours for your local branch office to view this request.

Once this request has been processed, you will receive notification with further instructions. To return to the Chubb Online Enrollment System please click the close button.

Return to User List

User List			
Name	User ID	Status	Update/Revoke
Adams, John	u46123	PASSWORD EXPIRED	<input type="checkbox"/>
Avery, Tina	u4pyr24	PENDING	<input type="checkbox"/>
Bell, Lisa	3ozkcs1	ACTIVE	<input type="checkbox"/>
Colman, Debra	u050513	ACTIVE	<input checked="" type="checkbox"/>
Dogood, Leslie	p620210	ACTIVE	<input type="checkbox"/>
Dragon, P	046appd	ACTIVE	<input type="checkbox"/>
Ellis, Perri	d3hwp12	PASSWORD EXPIRED	<input type="checkbox"/>
Feter, Mel	18uon3	PENDING	<input type="checkbox"/>
Galt, John G	SVVM3H	PENDING	<input type="checkbox"/>

Updating a User

If you want to know about

- Adding or changing someone's access
- Adding or changing a producer code number for a user

Introduction

You may only update two things for a user

- Role (Access)
- Producer Code Number

Role (Access)

You may need to change a user from one role to another or add an additional role. Initially, everyone receives the "Agent Universal" access that provides entry to:

- Chubb News
- Agency CheckView
- Agency ClaimView
- Preferred Vendor Network

Adding an additional role is easily accomplished by simply clicking the appropriate box opposite the requested role(s). Changing a role may require clicking in the box to eliminate a check mark and clicking another box to request the new role.

Updating a User

Producer Code Number

It may also be necessary to change an individual from one producer code number to another as responsibilities in your agency change. To do this, simply click once in the box no longer required and click again in the required box. Step-by-step directions are provided.

Note: When adding a user for the first time, the user automatically receives all of the producer code numbers that you, as an admin, have access to within the system. If the user should not have all of these code numbers, once the request has been approved by the local branch office, you, as the admin, need to perform an update to the individual's access by following the above steps.

Individual User's Profile

It is also possible that a user may come to you wanting a name change or other personal information change. This needs to be done by the individual user. Refer them to the "Change Profile" selection on the EAS Enrollment page. They can make the appropriate change there.

