

## **Chubb Download Solutions**

### **Improve Your Workflow**

Chubb understands how important it is to maintain accurate, up-to-date information about your Chubb business in your agency management system. That's why we offer Download, an automated, time-saving solution for maintaining Chubb policy, claims and accounting information through daily transaction updates that populate your system with the latest details.

#### *Why Download With Chubb?*

- **Gain Efficiency** – Your agency will no longer have to enter policy, accounting and claims information manually into your system. Think of the time it takes to key in renewal updates or details about extensive valuable articles schedules, manually reconcile a commission statement or maintain up-to-date claims information. Download takes care of such tasks automatically.
- **Ensure Accuracy** – With download, your system will be current within two days of when a transaction occurs, allowing you to provide accurate, up-to-date information to your customers more immediately.
- **Build Your Business** – Since you'll no longer need to manually enter data, you can dedicate more time and resources to finding prospects, writing new business and servicing your accounts.
- **Immediate Service** – Respond immediately to claims questions as current details are now available in your agency management system.
- **Easy Setup** – The enrollment process is so easy, we can have you downloading with us within five business days. See details on the reverse side of this fact sheet.
- **No Transmission Costs** – Chubb absorbs the IVANS (Insurance Value Added Network Services) transmission costs associated with download because we appreciate the value and efficiency gains it provides to your agency.

#### *How Download Works*

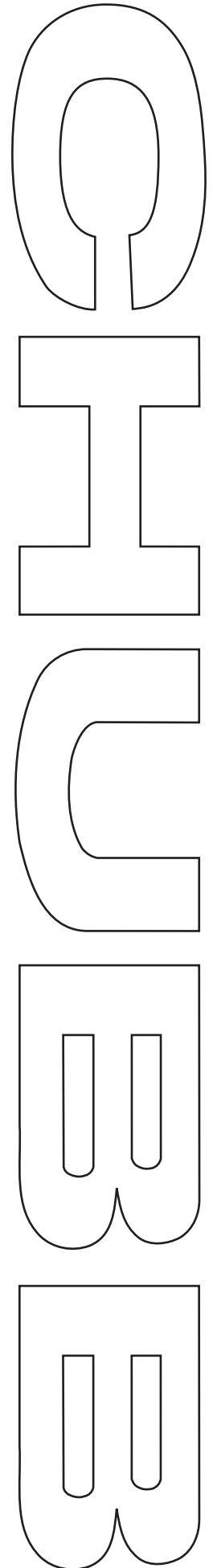
Download transmits updated policy, claims and/or direct bill commission data to a mailbox created for you by IVANS. Your agency management system is then able to pull that information out of your IVANS mailbox and import the details directly into your system.

#### **Five types of downloads are currently available:**

**Daily Policy Downloads** – Available for *Masterpiece*® except Yacht and Yacht Preference<sup>SM</sup> policies and most non-*Masterpiece* policies, this download transmits detailed policy information to your system within two days of when a Chubb policy transaction occurs. Transactions include new lines, renewals, endorsements, cancellations and restatements.

**Single Policy Resend** – Allows you to request a resend of an individual policy download without having to contact us. This feature is available via TransactNOW carrier transport and by selecting IVANS Single Policy resend from the Insurance Carrier Site Choices.

**Chubb Commercial PaperFree** – Imagine PDF versions of agent policy documents sent directly to your agency management system. Enroll in Chubb Commercial PaperFree, our revolutionary electronic policy distribution system, and receive electronic versions of all transactions that typically generate paper, including new lines, renewals, rewrites, endorsements, audits, cancellations and more. Most commercial and executive lines products and policy types are included. Visit [www.chubb.com/paperfree](http://www.chubb.com/paperfree) for details and enrollment.



**Monthly Direct Bill Commission Downloads** – Now available for both commercial and personal lines, this optional component of downloads sends commission data to your system on a monthly basis, allowing you to automatically update your accounting information. Monthly direct bill commission downloads require these agency systems: Applied TAM, Applied Vision, AMS Sagitta or AfW/360.

**Claim Download** – Receive daily downloads of your claim details to keep you on top of your customers' claims activities. This can handle both First Notice of Loss and Claims Status Updates. No more rekeying or searching for updates. Claim Download is only available to agencies using Applied TAM 9.3 or higher.

**Initial Downloads** – You can opt to receive data for all active policies and/or those that are issued but not yet active when first setting up download with Chubb. Consult with your agency management system vendor to determine if special requirements or one-time fees apply. Claims data is not available through initial download.

## *Who Can Use Download?*

Chubb is equipped to download personal policy information with the following agency management systems:

<b>AgencyPro for Windows</b>	<b>Hawksoft</b>
✓ <b>AMS for Windows (AfW &amp; AfW Online)</b>	<b>Infinity</b>
<b>AMS Prime and Prime 2000</b>	✓ <b>AMS InStar</b>
✓ <b>AMS Sagitta and Sagitta Browser</b>	<b>IRS - AIMS</b>
✓ <b>Applied TAM</b>	<b>Nexsure</b>
✓ <b>Applied Vision</b>	<b>Redshaw Elite</b>
<b>DORIS</b>	<b>SIS Semci Partner</b>
<b>Ebix One</b>	<b>VRC</b>
<b>Eclipse</b>	
✓ Available for monthly direct bill commission downloads. Claims download requires TAM 9.3 or higher.	

## *How to Enroll for Download*

Enrollment is an easy two-step process:

- 1. Complete our Download Request Form and forward it to your local Chubb marketing representative.** The form requests basic information about your agency, the type and version of your agency management system, and your IVANS "Y" account number. (If you do not have an IVANS account, we can help you set one up.) This form is available online at: [www.chubb.com/agents/chubb2019.html](http://www.chubb.com/agents/chubb2019.html).
- 2. Update your agency management system to accept downloads from Chubb.** Once we receive the completed Download Request Form, we will send you a Download Welcome Package that will walk you through the remaining steps to update your system.

## *Training and Support*

For commercial monthly direct bill commission or claims download, contact [ebusinesshelp@chubb.com](mailto:ebusinesshelp@chubb.com), or telephone 1.877.747.5266, option 3. For download training, we ask that you contact your agency management system support team to find out how the download software interacts with your specific agency management systems and versions.

Support for Chubb personal lines downloads is available on @chubb through Download Central. This online tool allows you to initiate resend requests, view download history and report any other problems. If you have questions or need help enrolling for personal lines download, contact CPI Premier Solutions at [premiersolutions@chubb.com](mailto:premiersolutions@chubb.com) or 866.324.8222 option 4.

\*Our download service supports all *Masterpiece* policies except Yacht and Yacht Preference policies and most non-*Masterpiece* policies.



**Chubb Group of Insurance Companies**  
P.O. Box 1615, Warren, NJ 07061-1615  
[www.chubb.com](http://www.chubb.com)

Chubb refers to the insurers of the Chubb Group of Insurance Companies. Actual coverage is subject to the language of the policies issued. Not all insurers do business in all jurisdictions.

Form 02-01-0230 (Rev. 9/09)