@chubb
Agency Administrator
User Guide

EAS - Chubb's Online Enrollment System

Introduction

What is the enrollment system?
Chubb's enrollment system provides a fast and easy way for agency employees to obtain User IDs for Chubb's secure Internet platform, referred to as @chubb.

Each agency will designate an Agency Administrator who will have the authority to request new User IDs, revoke existing IDs and perform other User ID maintenance functions.

This guide explains and illustrates each of the User ID enrollment functions to which the Agency Administrator has access.

How does the enrollment process work?
When the Agency Administrator requests a User ID via the Online Enrollment system, a message is sent to the local Chubb branch office, where the Marketing or Branch Assistant will obtain the necessary approval. Approvals are confirmed via a return email to the Agency Administrator with the new user's ID. A separate email is sent to the new user that contains the password required for system access.

We expect that the approval process should take no longer than two business days. A confirmation letter with the new User ID and password is mailed via US Postal Service. You may also call your branch for special situations.

The Agency Administrator also has authority for revoking User IDs in situations, namely when individuals leave the employment of the agency. This takes effect immediately and is an important aspect of the Agency Administrator's responsibility.

Access

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

Everyone has access to:
- Claims Applications (including Claim Details, ClaimCheck, and Report a Claim)
- Personal Lines marketing and sales resources
- Commercial Lines marketing and sales resources

Agency Licensing Contacts have access to:
- Producer Appointment Express

Accounting Specialists have access to:
- Business Policy Details
- Commercial Direct Bill
- Commercial/Personal Monthly Commission Statements
- Direct Deposit of Commissions
- My Policies

Agency Claims Contacts have access to:
- PL Claims Activity "My Alerts"

Accident & Health Agents have access to:
- Accident & Health Policy Inquiry

Access (continued)

Personal Lines Agents have access to:

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

Commercial Lines Agents have access to:

	Agent	Agent Leader
Business Direct Bill	√	√
Business Loss Runs	√	√
Business PolicyView	√	√
Cargo Certificate Issuance	√	√
Commercial Property Valuation	√	√
Customarq Classic Policy Forms	√	√
DecisionPoint: Professional Liability Quotes for Not-for-Profit Organizations and Private Companies	√	√
Employment Practices Liability Loss Prevention Services (ChubbWorks)	√	√
Life Sciences Forms	√	√
Life Sciences Wizard	√	√
My Loss Scenarios	√	√
Technology E&O “Smart App”	√	√
u.writer: Builder’s Risk	√	√
u.writer: Contractors’ Equipment Express	√	√
WORLDcert Clinical Trials Certificate Issuance	√	√
Monthly Commission Summaries		√

Agency Principals have access to:

- All products offered to Personal Lines Agent Leader.
- All products offered to Commercial Lines Agent Leader.
- All products offered to Accounting Specialist.

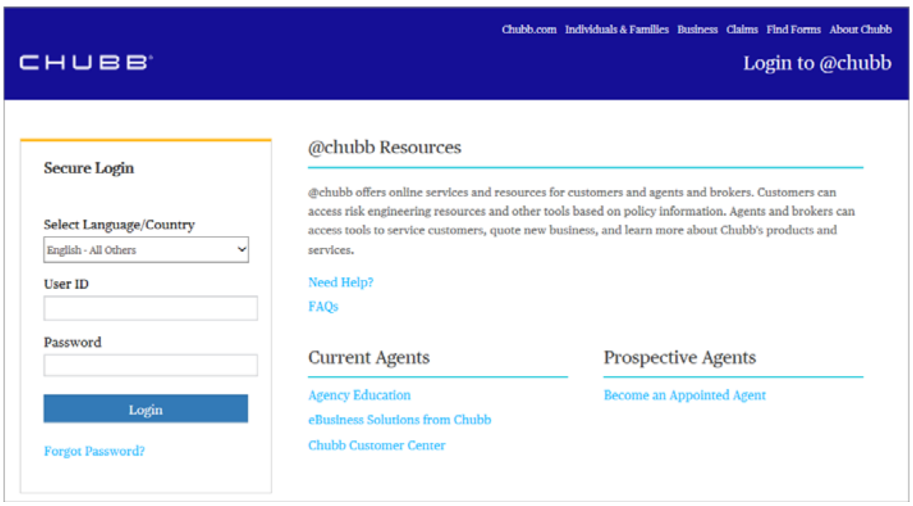
Introduction

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.

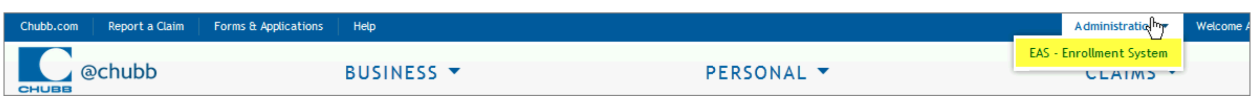
How to Login

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

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



4. From the main menu, navigate to the **Administration** drop-down and click on **EAS - Enrollment System**.



5. 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.

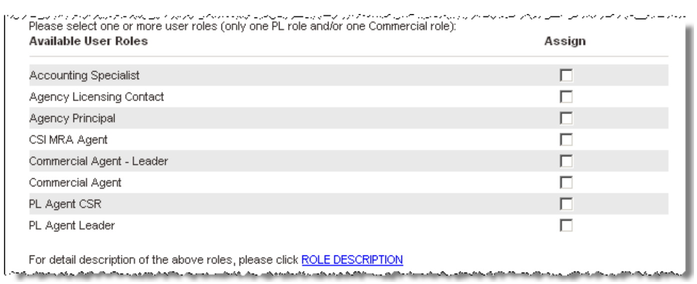
Requesting a New User

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

New User Information Steps 2 - 7

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.
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	☐
Agency Licensing Contact	☐
Agency Principal	☐
CSI MRA Agent	☐
Commercial Agent - Leader	☐
Commercial Agent	☐
PL Agent CSR	☐
PL Agent Leader	☐

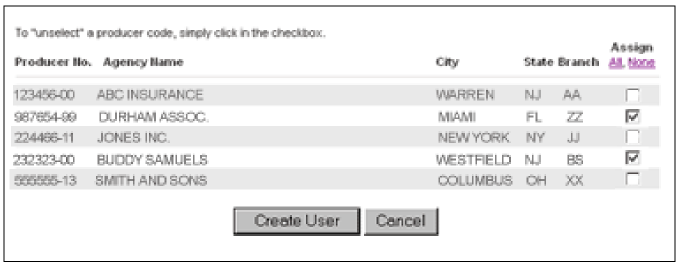
For detail description of the above roles, please click ROLE DESCRIPTION

Requesting a New User (continued)

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.

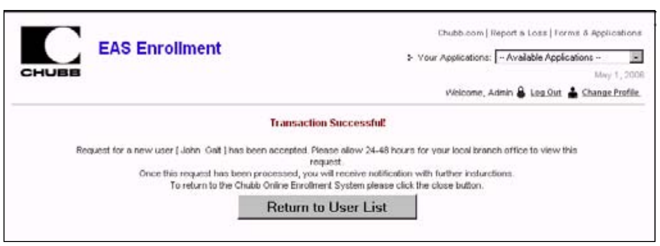
Producer No.	Agency Name	City	State	Branch	Assign (All, None)
123456-00	ABC INSURANCE	WARREN	NJ	AA	☐
987654-99	DURHAM ASSOC.	MIAMI	FL	ZZ	☑
224466-11	JONES INC.	NEW YORK	NY	JJ	☐
232323-00	BUDDY SAMUELS	WESTFIELD	NJ	BS	☑
555555-13	SMITH AND SONS	COLUMBUS	OH	XX	☐

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.

STEP 10 — Click **Create User**

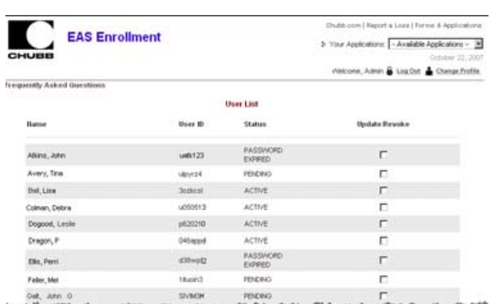


Click **Return to User List** to display a list of users including the one just added.

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.



Updating 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
- Claims Applications

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.

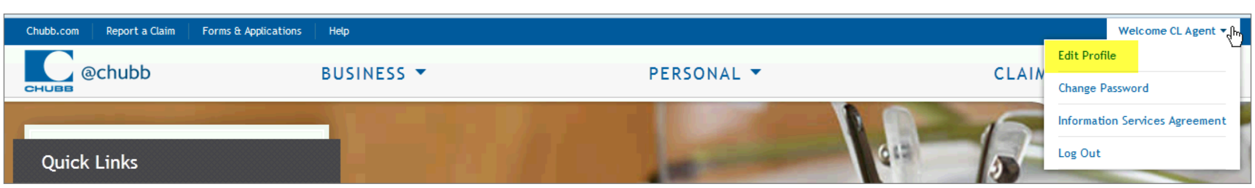
Producer Code Number

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.

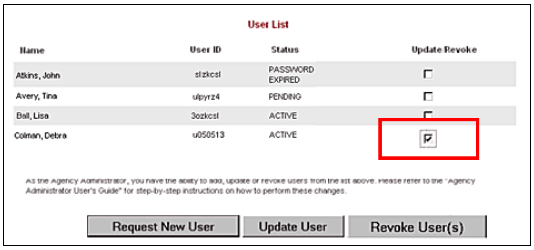
Individual User's Profile

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.



Procedure for Updating a User

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

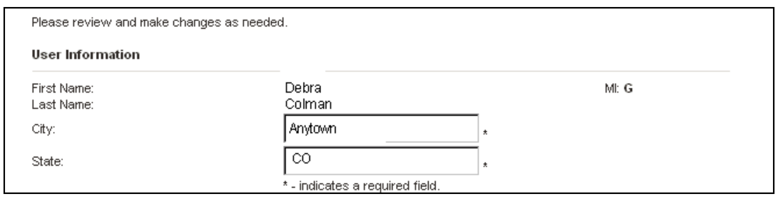


STEP 2

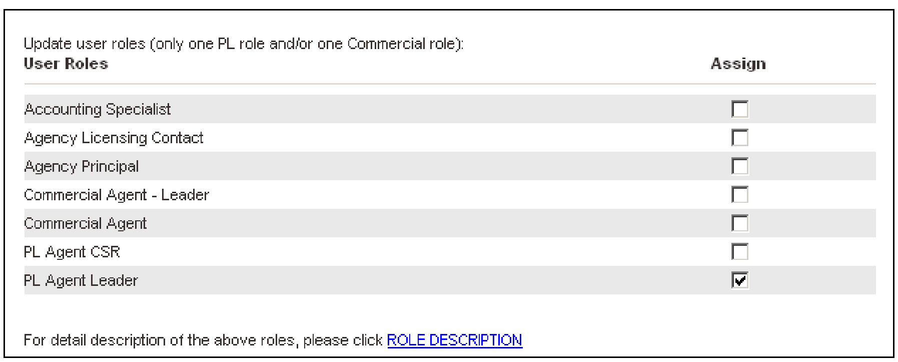
Click **Update User**

The **Update User** window displays for the selected person.

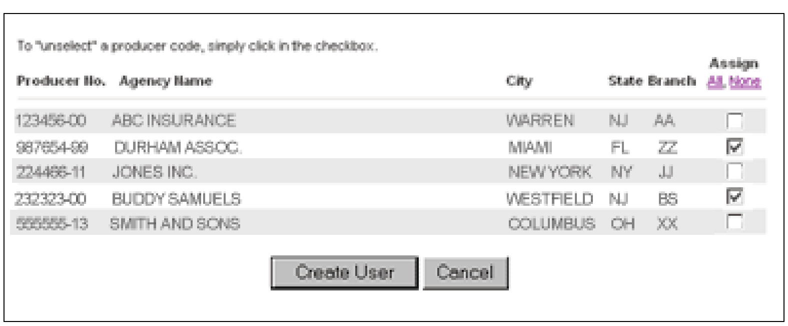
User selected for update



Role Description
See Step 4



Producer Code
Number
See Step 5



Updating a User Procedure (continued)

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…**

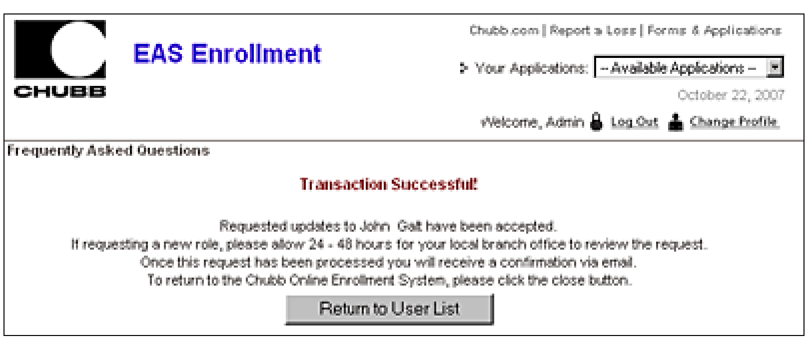
If you are	Then
Adding a Role	Click the box in the **Assigned** column that is associated with the desired role, a ☑ (check mark) displays in the box. Proceed to Step 6.
Deleting an existing Role	Click the existing ☑ (check mark) in the **Assigned** column associated with the Role to be deleted. Proceed 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 ☑ (check mark) displays in the box. Proceed to Step 6.
Deleting an existing Producer Code Number	Click the existing ☑ (check mark) in the **Assigned** column associated with the Producer Code Number to be deleted. Proceed to Step 6.

STEP 6 Click Update User

The **Transaction Successful** message displays.



Click Return to User List.

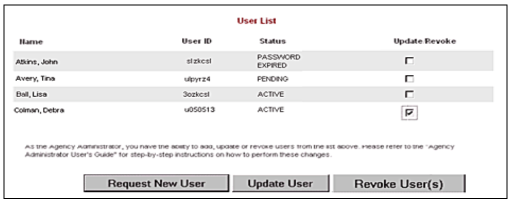
A list of users including the one updated displays.

Revoking a User(s)

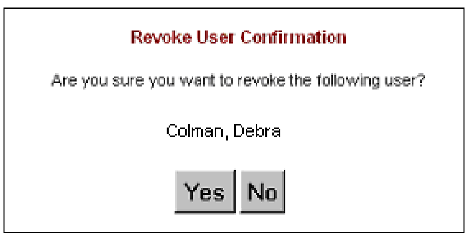
Introduction
Revoking a user(s) means that you no longer want this person to have access to the Chubb tools. There are many reasons for revoking someone. For example, the person has left the agency, or been given other responsibilities, etc. Regardless of the reason, the process for revoking a user is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



STEP 2 Click [Revoke User(s)]
The following **Revoke User Confirmation** message displays.



STEP 3 Click [Yes]
The **User List** displays.

Special Notes:
Defining Agency Preferences (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

Additional Assistance

If you have any problems accessing or using **@chubb**, please contact us at:

Personal Lines Agents
Premier Solutions Team
1-866-324-8222, option #1
premiersolutions@chubb.com

Commercial Lines Agents
eBusiness Help Desk
1-877-747-5266, option #2
ebusinesshelp@chubb.com

Records

Agent	Producer Numbers	Roles