Pacific Specialty Insurance Company

Producer Download Manual

Personal Lines Programs

Version 1.5 (May 2012)

About This Documentation…

This document outlines the procedures necessary to set up your producer management system to receive download information from PSIC. Since procedures vary with different vendor systems, you will need to refer to your vendor's producer management system documentation for specific information required to complete the setup screens. *THIS SETUP MUST BE COMPLETED <u>BEFORE</u> PSIC CAN START DOWNLOADING TO YOUR AGENCY.*

Thank you for agreeing to participate in Producer Download with Pacific Specialty Insurance Company. Our download partnership should prove to be beneficial to both your producer and our company, as our databases will contain policy information that mirrors each other. As always, we appreciate your business.

What is Policy Download?

Policy download is a method of electronically delivering key personal lines policy data from Pacific Specialty's policy administration system to your agency management system, updating your policy database with the most current information. PSIC will send your new business, renewal, non-renewal, endorsement, cancellation and reinstatement policy transactions processed each day into your IVANS mailbox. Through your agency management system an IVANS download session is initiated each day to automatically retrieve and process this policy data into your management system updating your client files accordingly.

IMPORTANT: Please direct any agency management system setup issues to your software vendor.

PSIC Download Support: For all other download-related issues, please contact our Download Support Help Desk at PDHelp@McGrawGroup.com.

Roles & Responsibilities

In order for the PSIC Policy Download process to work effectively, each party must recognize their respective roles and manage their responsibilities:

Pacific Specialty:
- Provide the producer with appropriate information on the data available;
- Provide producer support by knowledgeable staff who understand the download process
- Pay IVANS communications costs for download;
- Work with the management system vendor to resolve issues in the data and the process.

Producer:
- Read and understand all materials provided by the management system vendor;
- Understand the issues related to the data provided by the carrier versus how the management system loads the data;
- Periodically spot-check download data.

Management System Vendor:
- Provide the producer with appropriate training and training materials, on both the data processed and the policy download process in general;
- Provide support for their products and the connectivity to IVANS;
- Work with the carrier to resolve any issues with processing the data.

Supported Lines & Vendors

Vendors	Product Lines
Agency Advantage - The Agency Advantage*	A H L R W
Agency Software - AgencyPro	A H L R W
Agency Software - AgencyPro SQL	A H L R W
Agency Software - EasyApps Pro	A H L R W
Agency Software - EZAgent	A H L R W
Applied DORIS 9.3	A H L R W
Applied Epic 4.0	A H L R W
Applied TAM 10.4	A H L R W
Applied Vision 6.3	A H L R W
Hawksoft	A H L R W
QQ Solutions (Quick File, Quick Download & Evolution)	A H L R W
Quomation - PowerManage	A H L R W
StoneRiver - FSC Manager	A H L R W
Vertafore/AMS AFW	A H L R W
Vertafore/AMS 360	A H L R W
Vertafore/AMS Instar	A H L R W
Vertafore/Prime	A H L R W

*-*In Development*

Product Line Codes
A (Auto):
PPA, Street Motorcycle, Excess Liability
H (Homeowners):
HO-3, HO-4, HO-6, DP-1, DP-3, MHO *Excess Flood, Stand-Alone EQ, Travel Trailer*
L (Liability):
Personal Umbrella, CPL
R (Recreational Vehicles):
Off-Road Motorcycle, Motorhome
W (Watercraft):
Personal Watercraft, Pleasure Boat

For information on any vendor or product line listed above, please contact our Download Support Help Desk at PDHelp@McGrawGroup.com.

Transactions Received Through Download

The types of transactions that will be downloaded are new business, renewals, non-renewals, endorsements, cancellations and reinstatements.

Position #:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
	A	A	A	A	9	9	9	9	9	9	9	9	9	9	9	

"A", "W" or "F"
This will be a (blank) space or a letter
Starting point: numeric portion of policy
2-digit renewal #
2-digit endorsement #

Policy Numbers

PSIC policies have the format of AAAA99999999999:

- *The first letter will be "A", "W", or "E";*
- *The 4th character could be a either a letter or a space;*
- *The numeric part of the policy number will always start at position 5.*
- *The numeric part exists of a 7 digit policy number, two-digit renewal number and a two-digit endorsement number. Make sure that any PSIC policy number in your system already has the numeric part starting at Position 5 so that the download can find a match.*
(Example: WNFX12345670001)

Setup Information – Part 1 (Producer Supplies to PSIC)

Setup Information that PSIC will need from producer:

- Your McGraw/PSIC producer code: _____

- Your origination information:
    - Agency Management System Information:

        - Vendor: _____

        - Product: _____

        - Format: AL3

    - Mailbox Information:

        - Account: _____

        - User ID: _____

Setup Information – Part 2 (PSIC Supplies to Producer)

Setup Information that producer will need from PSIC:

- PSIC's NAIC Code: **37850**

- PSIC's origination address:
    - Account: **PACS8**
    - User ID: **PACS801**
    - Machine Address: **IBM650PSIC**
    - Company Coverage Codes: **See table on next two (2) pages**

Company Coverage Codes

AL3 Code	Description		Line of Business
Z1AID	First Aid Expense		HOME
ZACSL	Underlying Auto Liability CSL		PUMB
ZALD	Active Lease Discount		HOME
ZALIA	Animal Liability.		HOME
ZARES	Additional Residence		PUMB
ZASPL	Underlying Auto Liability Split Limits		PUMB
ZAXCL	Animal Liability Exclusion		HOME
ZBFU	438BFU Mortgagee Clause		HOME
ZEEXP	Emergency Expense Coverage (Separate ROAD coverage exist)		AUTO & HOME
ZFIRE	Fire Alarm (ALARM is already taken for Burglary Alarm)		HOME
ZFRFE	Fraud Fee		AUTO
ZHPL	Underlying Personal Liability Limits		PUMB
ZLBCU	Limited Building Code Upgrade		HOME
ZLIEN	No Lien holder Credit		HOME
ZLLC	LLC as Additional Insured endorsement		HOME
ZLSS1	Prior Non-Theft Loss Surcharge (1st occurrence)		HOME
ZLSS2	Prior Non-Theft Loss Surcharge (2nd occurrence)		HOME
ZLSS3	Prior Non-Theft Loss Surcharge (3rd occurrence)		HOME
ZLSST	Prior Theft Loss Surcharge (1st occurrence)		HOME
ZMACH	Machinery Damage Limitation		BOAT
ZOWNR	Owner Occupancy Endorsement		HOME
ZPCSL	Underlying Watercraft Liability CSL		BOAT
ZPP	Personal Property Auto		AUTO
ZPREP	Personal Property Replacement Cost Watercraft		AUTO
ZPTF	Purchased Through Foreclosure Endorsement		HOME
ZROOF	Roof for Fire & Lightning Only Endorsement		HOME
ZS100	100/300 underlying liability surcharge - auto		PUMB
ZS250	250/300 underlying liability surcharge - auto		PUMB
ZSA3K	300 CSL underlying apartment/rental liability surcharge		PUMB
ZSAPT	Apartment/Rental Surcharge		PUMB
ZSDRV	Youth-full driver surcharge		PUMB
ZSEAS	Seasonal Occupancy Surcharge		HOME
ZSENR	Senior Discount		HOME
ZSIP	Secured Interest Protection (Auto)		AUTO
ZSLMT	Special Limits Endorsement		HOME
ZSM3K	300 CSL underlying Motor Home surcharge		PUMB
ZSMAJ	Major Violation Surcharge (Umbrella)		PUMB
ZSP45	Watercaft Surcharge <= 45 MPH		PUMB
ZSP55	Watercaft Surcharge > 45 & <= 55 MPH		PUMB
ZSP70	Watercaft Surcharge > 55 MPH		PUMB
ZSR3K	300 CSL underlying personal liability surcharge		PUMB
ZSRNT	Rental Units surcharge (Umbrella)		PUMB
ZSRV	Additional Motor Home/RV surcharge		PUMB
ZSTOR	Storage (Auto) coverage		AUTO
ZSV	Add'l Veh Surcharge		PUMB
ZSV3K	300 CSL underlying vacant land liability surcharge		PUMB
ZSV50	Vacant Land <= 50 acres Surcharge (Umbrella)		PUMB
ZSV99	Vacant Land > 50 acres Surcharge (Umbrella)		PUMB
ZSVIO	Minor/Accident surcharge (Umbrella)		PUMB

Company Coverage Codes (continued)

AL3 Code	Description		Line of Business
ZTAIR	Aiplane Type Trailer Sucrharge		HOME
ZTCDD	Tenant Caused Deductible		HOME
ZTHFT	Theft Prevention Fee		AUTO
ZTPPP	Protected Property		HOME
ZTPRF	In Park, Preferred Tier		HOME
ZTREP	Total Motorhome Replacement Cost		AUTO
ZTRLR	Trailer Coverage		AUTO
ZTSTD	In Park, Standard Tier		HOME
ZUDWL	Underlying Dwelling Coverage		HOME
ZUPP	Underlying Personal Property Coverage		HOME
ZVACL	Vacation/Trip Lialibilty		AUTO
ZWCSL	Watersports Liability CSL		BOAT
ZWSPL	Underlying Watercraft Liability Split Limits		PUMB
ZWXCL	Water Damage Exclusion Endorsement		HOME

Starting the Download Process

Once you have completed the necessary setup process on your producer management system, email the setup information on the previous page to IVANS@McGrawGroup.com.

All policy transactions (except non-renewals) processed each day with your PSIC producer code will be downloaded to the producer management system in your office within 24 hours.

Policy Download FAQ

How does the download work?
- PSIC sends IVANS a nightly batch file of all new business, renewal, endorsement, cancellation and reinstatement policy transactions that were processed for that specific day;
- IVANS will hold this download data for up to 30 days;
- The producer retrieves the download from IVANS through their producer management system (we recommend that this be done on a daily basis);
- The producer management system then formats the data and updates the policy information.

Can I have all of my PSIC polices loaded on the initial download?
- Yes. Upon written request (IVANS@McGrawGroup.com), we can have a comprehensive initial download available within 1 business day. As we value your business, PSIC will not charge you for this service. Please note that some vendors will charge for this service – we recommend that you contact them for an estimate.