

Real-Time Interface

Carrier Guide April 2013

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What is Transformation Station™?

Transformation Station is real-time interface between your agency and insurance companies over the Internet. Agents using Transformation Station are able to communicate with carriers instantly, before a customer or prospect ever leaves their office.

The bottom line: Transformation Station helps both agencies and carriers to be more profitable and provide better service to customers.

Why do I need it?

Transformation Station improves communication between agents and carriers by seamlessly enabling agents to:

- Rate and issue policies in real-time
- Submit real-time First Notice of Loss
- Bridge their data to a company's website
- Perform real-time inquiries to companies for:
- Billing and Payment Status
- Policy Status
- Claim Status
- Loss Run Reports
- Make Payments

Applied Systems has automatically set up its entire agency customers with Transformation Station™ accounts, pre-configured for real-time interface with the companies they represent.

Released Versions

- TAM v6.3 and above

How much does Transformation Station cost?

The use and support of Transformation Station is **included** in an agency's annual Batch Back Support and Maintenance Agreement.

Installation Guide

A requirement of using "Real-Time Interface" through TAM or Vision is that your agency must be current on Batch Back Support. If you have any questions, please contact Applied Systems Sales @ 1-800-999-5368.

Some of the real-time implementations require that at a minimum Adobe Acrobat Reader v4.5 be installed on every desktop. A free copy of the software can be downloaded from:

http://www.adobe.com/products/acrobat/readstep2.html

TAM v6.3, v7.0, v7.1, v7.1.1, v7.2, v7.3, v7.4, v7.5, v8.x, v9.x, v10.x Agents
Vision v2.3, v2.4 v3.x, v4.x, v5.x, v6.x Agents
TAMOnline Agents

Questions? Please refer to the Help System available from within Real-time Interface.

1. Make sure that you or your agency has a connection to the Internet. One way to tell is to type in the following URL into your browser:

    a. https://chicago2.warpcentral.com

    b. The page with the wording "DENVER2 DENVER ORANGE" should appear.

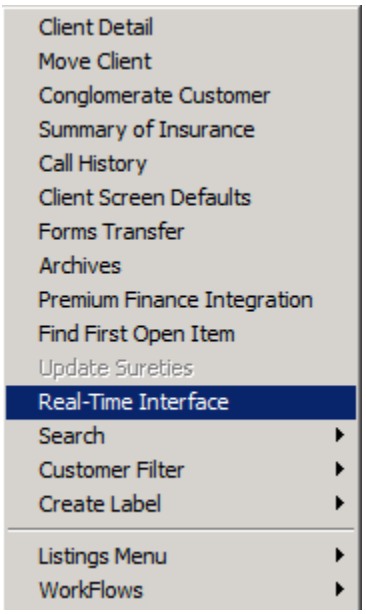
    c. If the page does not appear or an error is presented then either a connection is NOT made to the Internet or your network will not allow access to this website. Please contact your System Administrator to correct the problem before continuing.

2. Run TAM or Vision. Please note that you must log into TAM/Vision as a user with the same rights as an EXEC user in order to perform this process.

3. TAM - From within Client Activity click on the Real-Time Button 

or click on the Options Button 

and select "Real-Time Interface".



4. Vision - From within Client Activity click on the Transformation Station Button.



5. 1st TIME ONLY – The Initial Account Setup wizard with run after clicking on the butterfly to automatically configure your Transformation Station account.

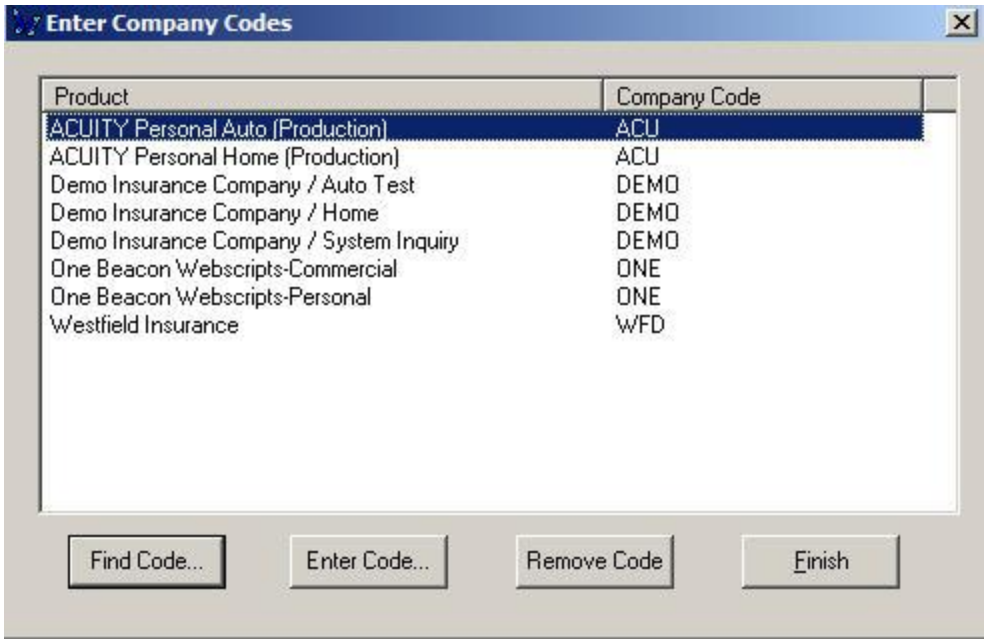
   First screen of the Setup Wizard. Click ***Next***.



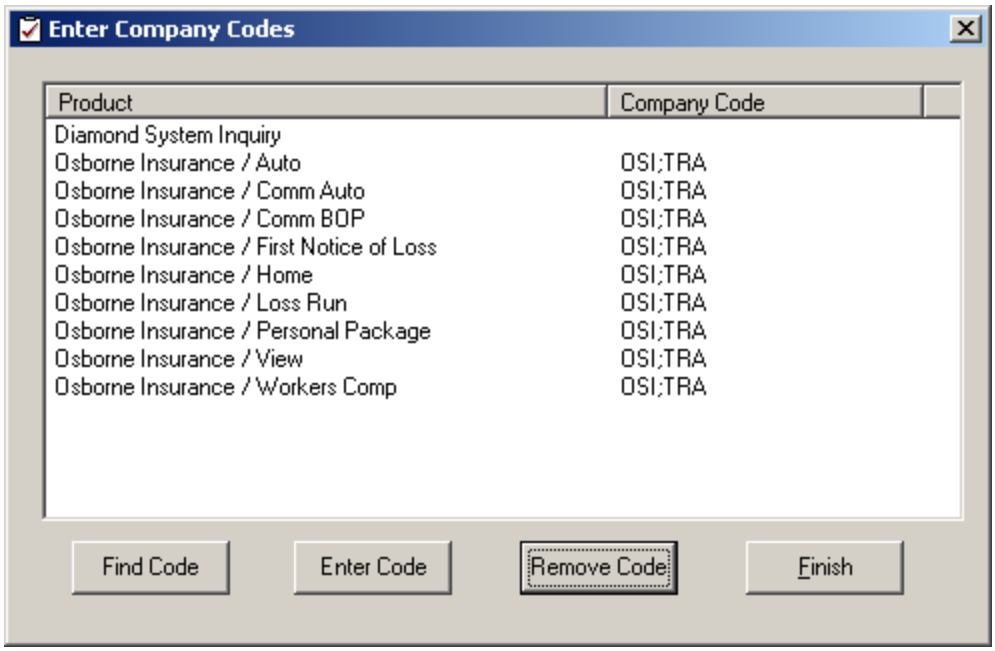
   As the Initial Account Setup is run, you will see the Real Time Connect dialog box appear in the bottom right hand corner of your screen. The messages displayed will update you on the progress of your configuration.



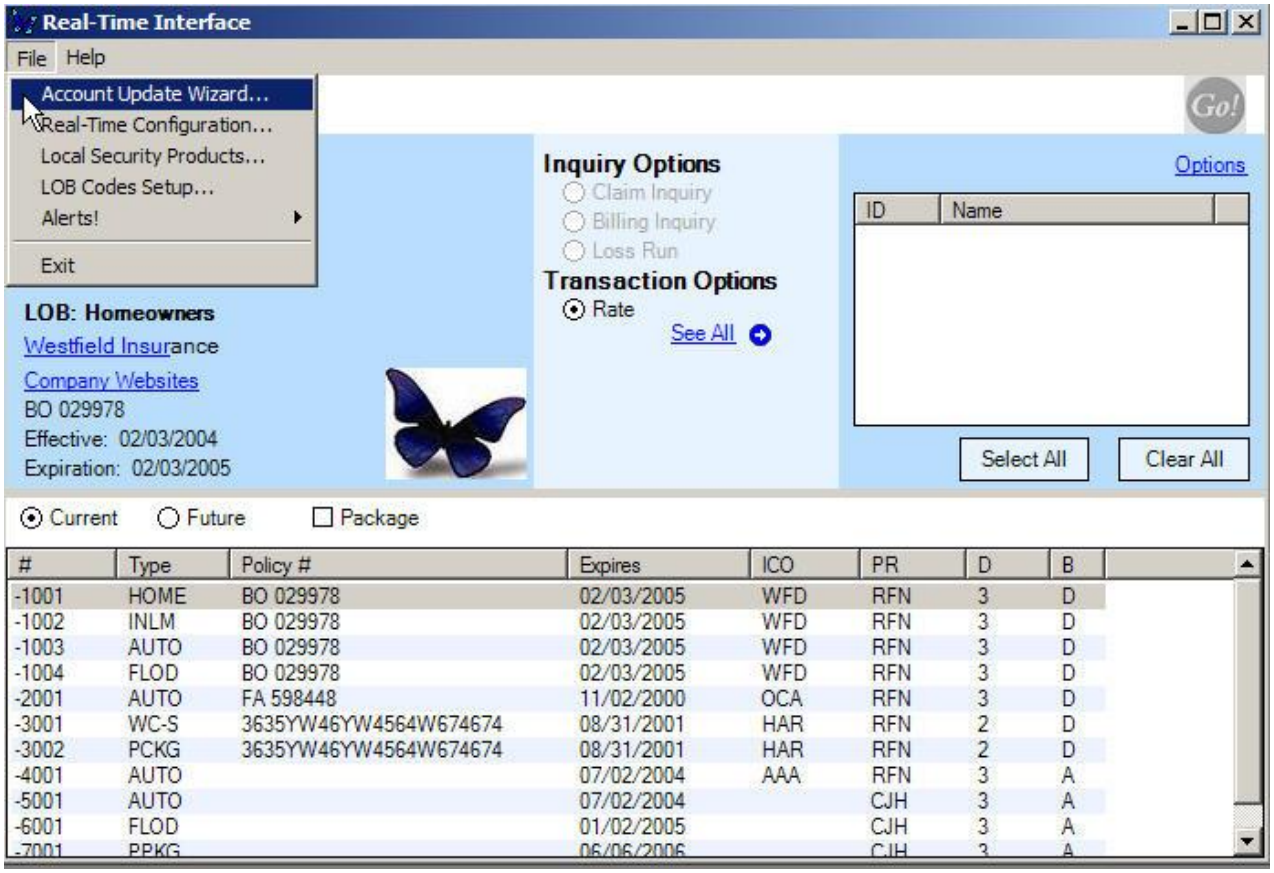
6. During the process of your account configuration, you will be presented with the screen below. This screen allows you to associate your Products with TAM Company Codes.



- ***Find Code*** allows the user to select the company codes from TAM's Company Lookup dialog box.
- ***Enter code…*** allows the user to type in the TAM Company Code.
- ***Remove Code*** sets the product's company code to a blank.
- By holding the [Shift[or [Ctrl] key, you can select multiple products to enter the same company code.
- You can enter more than one company code per product by separating the Company Code with a ";".



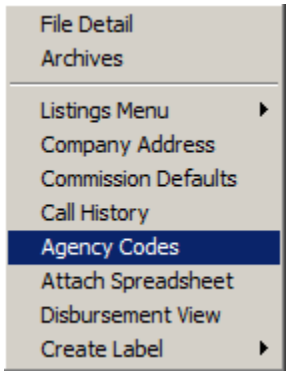
7. **<u>ACCOUNT UPDATE</u> –** As new products are added to your account, it will be necessary for you to perform an account update to configure these new products on your system. From within the *Real Time Interface*, click ***File***, ***Account Update Wizard***



8. After connecting to Transformation Station and receiving your products, you will again be presented with the screen outlined in step 7 to associate any new Products with TAM Company Codes.

9. After setting all necessary codes, click finish to return to the Real-Time Interface to run Real-Time transactions.

10. For all the carriers enabled, please make sure that an agency code/contract number is setup for all agencies and branches. If your agency has only 1 set of codes per agency, you only need to set these up for branch 1. This option for agency codes is located within the carrier section of File Activity.



11. **Refer to the "Carrier Guide" section below for further instructions.**

For update-to-date Real-Time Reference Guides on available carrier products please visit the links below:

Personal Lines:

http://us.appliedsystems.com/downloads/RealTimeRefGuidePL.pdf

Commercial Lines:

http://us.appliedsystems.com/downloads/RealTimeRefGuideCL.pdf

Carrier Guides

ACE Private Risk Services Agents

ACE Private Risk Services has enabled Policy Inquiry, Billing Inquiry, Claims Inquiry and Company Web site for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid ACE Private Risk policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for ACE Private Risk will be requested and stored. These must be entered in order to proceed. If you have questions about your ACE Private Risk ID or Password, please contact ACE Private Risk Services Customer Support at 800-444-6161, Option 2.

7. A request is sent directly to ACE Private Risk via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

ACUITY Agents

ACUITY has enabled Billing Inquiry, Policy Inquiry, Claims Inquiry, Loss Run Inquiry and Personal Lines Endorsement Bridge for all agents. They've also enabled Auto, Home and Package bridge for all personal lines agents in all states and Commercial Auto bridge and Work Comp bridge for all commercial lines agents in all states.

1. From within Client Activity, locate a valid *ACUITY* customer.

2. Select the "Blue Butterfly" real-time button or select "Real-time Interface" from the Options button.

3. Select "Billing Inquiry", "Policy Inquiry", "Claim Inquiry", "Loss Run Inquiry", "Rate", or "Endorsement".

4. Select the Policy from the list.

5. If Quoting, click Next button and select *ACUITY* appears within the list of selected carriers.

6. Click Finish.

7. A request for the Inquiry or Quote is sent directly to *ACUITY* via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.

8. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.

9. To run a package rating transaction, from the real-time interface select the "Package" button above the policy listing. After the Package button is selected, hold the CTRL key down to highlight the policies to be included in the XML request message. After selecting the policies, choose the corresponding ACUITY package product and click "GO".



APPLIED SYSTEMS – CoreLogic

Transformation Station MVR order set-up process

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1. If your agency is currently on Interface Support and on a version of TAM or Vision that supports ADR, Applied Systems will submit your customer MVR account request to First Advantage ADR.

2. First Advantage ADR will begin account verification and password encryption upon receipt of the MVR request from Applied Systems.

3. You will be notified via email, when your account has been established. The company name, American Driving Records, will be added to your Transformation Station listing once the Account Update Wizard is run.

4. After your account has been confirmed by Applied Systems, you will be contacted by an ADR Installation Support representative, for your Transformation Station training.

5. Your training will include login process and accessing MVRs on TAM.

6. Allow 30 minutes to complete Transformation Station training.

For new account status information, email tsrequests@appliedsystems.com.

For Transformation Station technical support, contact Applied Systems Customer Support at 800-999-6512, option 4.

Alfa Alliance Insurance Corporation

Alfa Alliance Insurance Corp. has enabled **Billing, Policy and Claim inquiry** for Personal Automobile, Homeowners, Commercial automobile, BOP and Artisan lines of business.

Additionally AAIC has enabled **New Business Rate (bridge**) for Personal Automobile and Homeowner Lines of Business.

1. For both inquiry and rate, your agency code must be set up correctly in the Company File for Alfa Alliance. Please make sure you go to the Codes section in the company file to enter the code. If you have accounting set up at the branch level, please enter a code for each branch. *Your code must be a 7 character code as it appears in ASAP or on an Alfa Alliance policy declaration page.*

2. From within Client Activity, locate a valid Alfa Alliance Insurance Corp. policy.

3. Select “real-time Interface” from the Options button OR click on the butterfly icon.

4. From the list of transactions and select “Billing Inquiry”, “Policy Inquiry”, “Claim Inquiry” , Personal Automobile Rate” or “Homeowners Rate”.
5. Select the policy from the list.

6. Click “GO”.

7. The first time a user processes an inquiry, the ID and Password for ASAP will be requested and stored. Please make sure not to use the Agent’s Only ID and Password. The password entered must be the one used to access the Alfa Alliance Insurance Corp. ASAP Rating system. If you are trying to use an ID that has an email address in it, that is the incorrect set of credentials. If you have questions about your ASAP ID or Password, please contact Alfa Alliance Insurance Corp. Customer Service at 1-800-989-6053 or Mary Moxley at 1800-394-8642 x 460 mmoxley@alfaaic.com.

8. A request is sent directly to ASAP via Transformation Station. After the request is processed, the Alfa Alliance Insurance Corp. website will open to view the requested inquiry or to complete the new business transaction within ASAP. For inquiry several links within the Alfa Alliance Insurance Corp. Inquiry will take you directly to further view or process information such as a websweep/wepay transaction or view a policy document.3/26/2013

9. After closing out of the “Real Time Interface” program, the agent will be given the opportunity to complete an activity.

Allied Insurance Agents

Allied Insurance has enabled their commercial lines agents for Business Owners, General Liability, Workers Compensation, Commercial Property, and Commercial Auto Rating.

Agents are required to have TAM v7.1.1 and higher, or Vision v3.0 and higher.

1. From within Client Activity, locate a valid customer. Highlight the line of business you want to export. You may only export one line at a time.

2. Select "Real-time Interface" from the Options button, or click the Blue Butterfly.

3. Select the “Rate” option..

4. Select Allied Insurance from the list of carriers.

5. Click “GO” to send the policy data directly to Allied’s Agent Center.

6. The first time a user processes an inquiry, an Allied Agent Center User-Id and Password will be requested and stored. This User-Id and Password must be entered in order to proceed. If you have questions about your Allied Agent Center User-Id or Password, please contact the Allied Insurance Agent Center Help Desk at 1-888-667-3866.

7. A request is sent directly to Allied Insurance via Transformation Station. Complete the missing information using drop-downs and free-form fields. Edit as necessary. After the request is processed, the response is sent back to the agent's desktop.

8. The quoted premiums for the policy and coverages will appear along with a Website Link to the policy at the Agent Center. Click the link to be automatically sent to Allied’s Agent Center in order to review and or make changes to the quote.

9. Click the blue “line of business” link to access Quote Detail also known as the Agent Center Proposal.

10. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity on their Applied System.

Allstate Personal Lines Agents

Billing Inquiry is enabled for Allstate Personal Lines and Commercial Auto.

Claim Inquiry and Loss Run is enabled for Allstate Personal Auto, Commercial Auto, Auto – Special, Homeowners, Condominiums, Renters, Landlords, Residential Fire, Mobile Home, and Boat Owners.

Personal Auto rating is enabled for the following states:
CA, CO, FL, IL, MO, OH, TN, KS, LA, OR, VA, AL, IN, AZ, MS, PA, MD, and TX (as of 11/15/04)

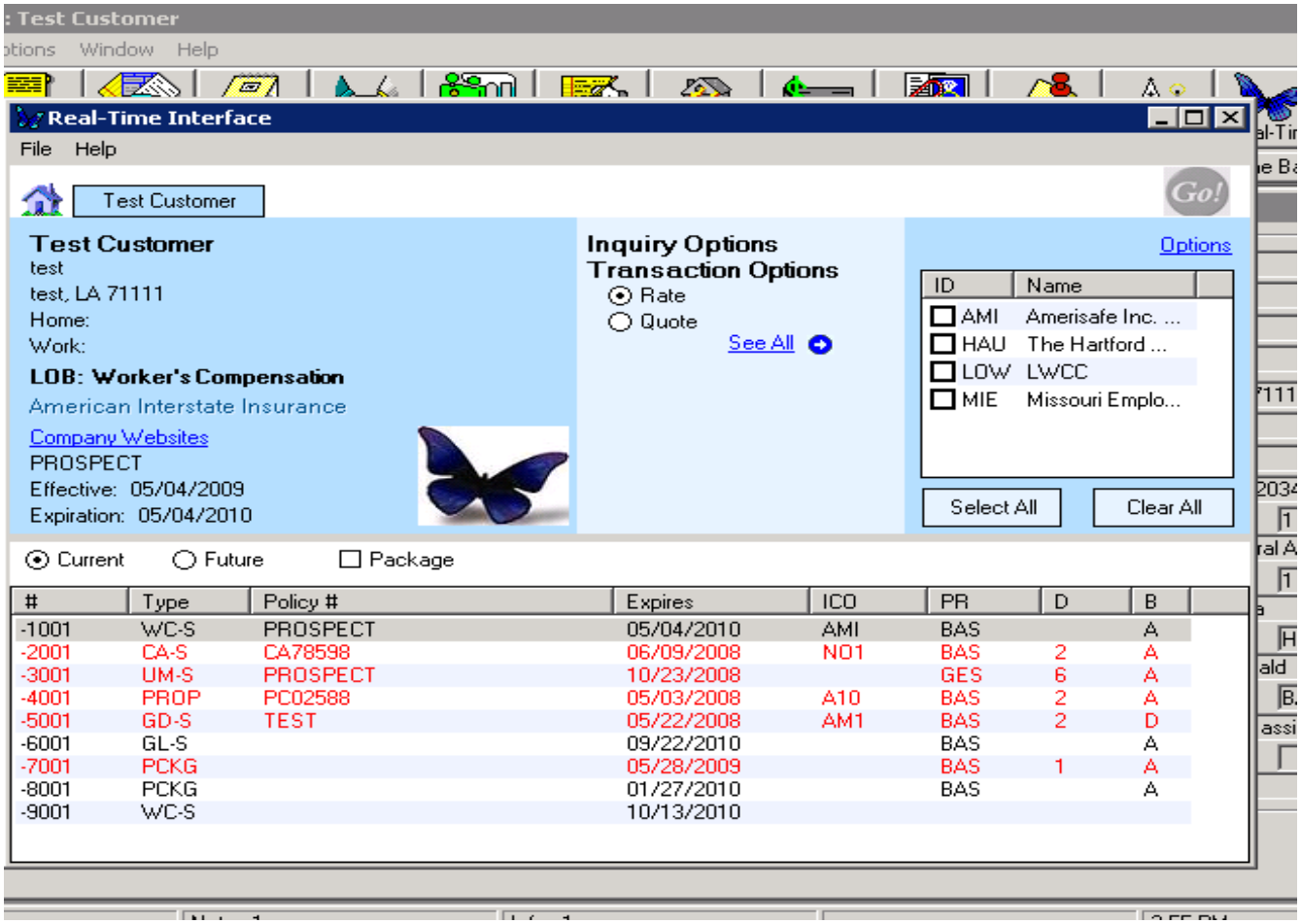
1. From within Client Activity, locate a valid Allstate policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Billing Inquiry or Rate.
4. Select the policy from the list.
5. Click Next. If Rating, make sure that Allstate appears within the list of selected Carriers.
6. Click Finish.
7. The first time a user processes an inquiry, an ID and Password for Allstate will be requested and stored. These must be entered in order to proceed. **Important! For Rating, the Allstate agency id, e.g. A212345, and associated password must be entered.** For Billing and Claim Inquiries, either the agency id or support staff ID, e.g. SIL12301, and associated password should be entered. If you have questions about your Allstate ID or Password, please contact Allstate’s Agency Support Line at 800-336-9400.
8. A request is sent directly to Allstate via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.
9. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.
10. If rating, the quote was saved to ALSTAR to facilitate completing the new business application.

Amerisafe Agents

Use these steps to complete an upload from TAM to Amerisafe.

1. Select the customer from your Clients and Files list.
2. Click the blue butterfly in your Applied toolbar.
3. Select the Work Comp app in the Real-Time Interface that you intend to bridge to Amerisafe.
4. Check the Amerisafe checkbox and click Go. If Amerisafe does not appear as an option, please contact your system administrator or your Amerisafe Marketing Associate for Help.

Any questions regarding the above process can be answered by calling Applied Systems customer support @ 800-999-6512. Remember to choose option 4.



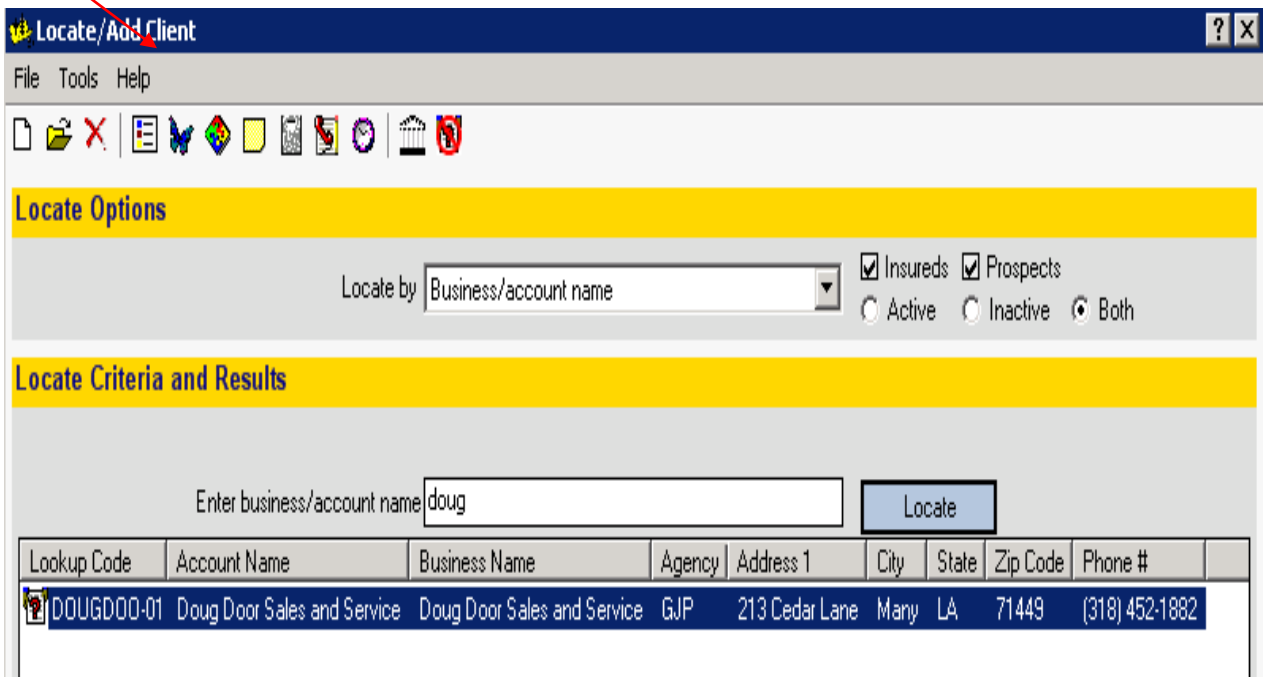
After the transaction is finished processing, an internet browser will open to the Geaux Workstation. Instructions for completing the submission within Geaux are located on the reverse side of this guide. *The application has not yet been submitted; it is in a Draft form and must be completed in order to be officially submitted.*

Amerisafe Agents

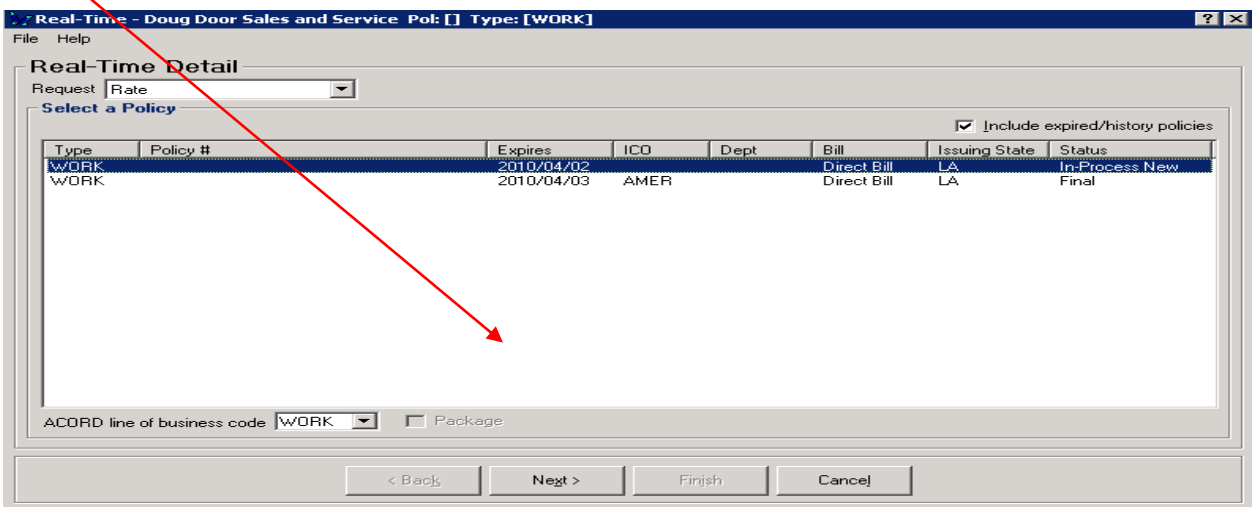
Use these steps to complete an upload from Vision to Amerisafe. Any questions regarding the above process can be answered by calling Applied Systems customer support @ 800-999-6512. Remember to choose option 4.

Locate the customer from your Clients and File Activity menu.

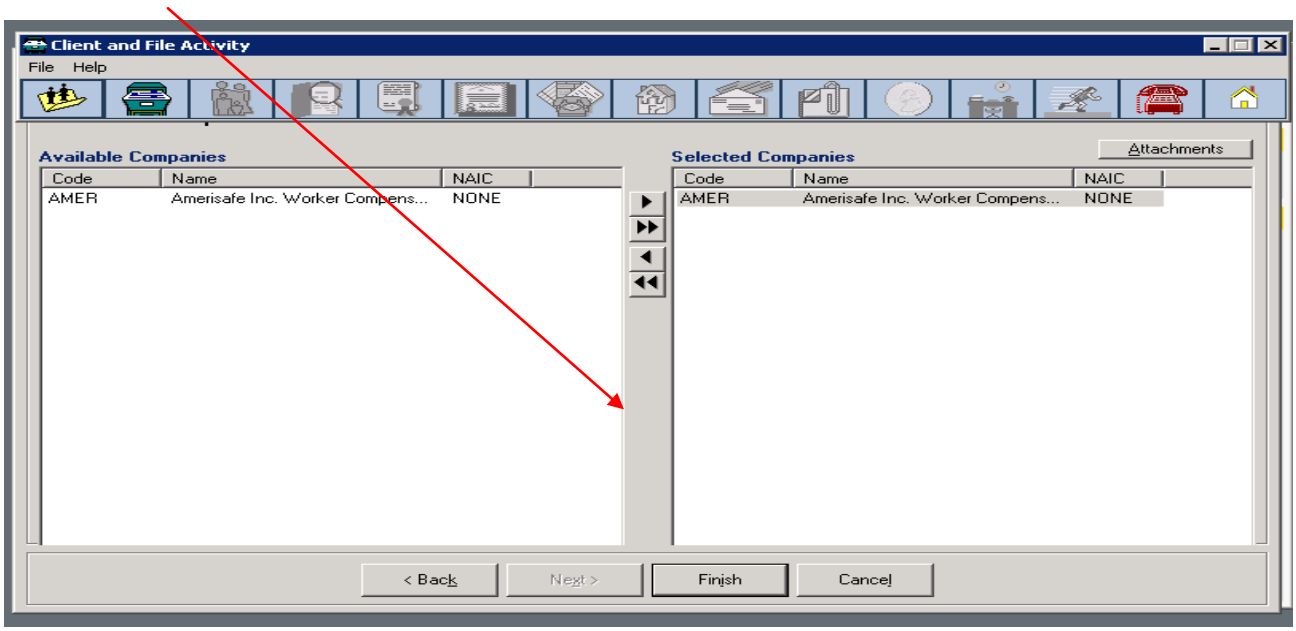
1. Click the blue butterfly in your Applied toolbar.



2. Select the Work Comp app in the Real-Time Interface that you intend to bridge to Amerisafe and click Next.



3. Select Amerisafe from the list on the left and move it over to the list on the right and click finish.

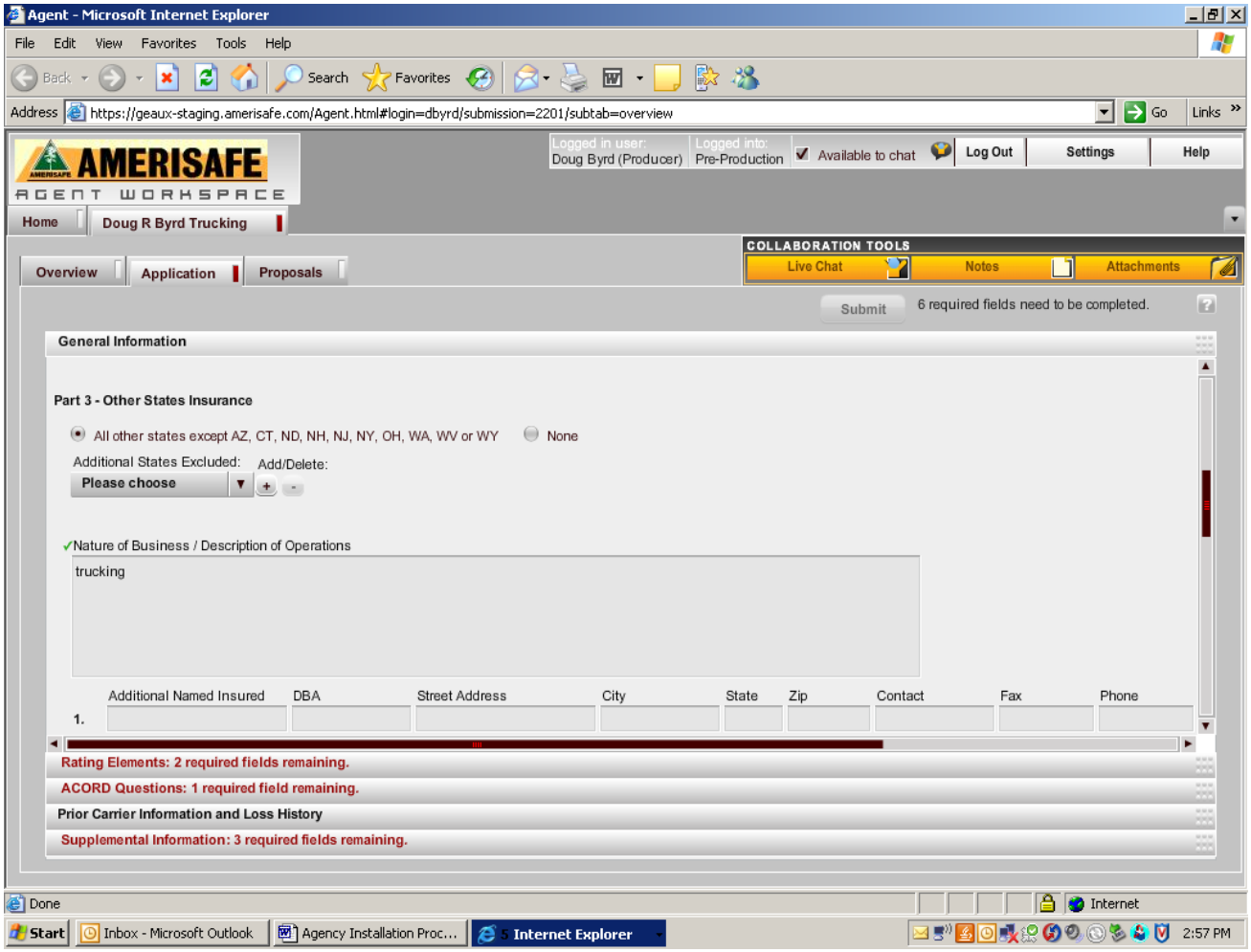


After the transaction is finished processing, an internet browser will open to the Geaux Workstation. Instructions for completing the submission within Geaux are located on the reverse side of this guide. *The application has not yet been submitted; it is in a Draft form and must be completed in order to be officially submitted.*

Instructions for Submitting an Application after Upload

https://geaux.amerisafe.com/Agent.html

1. The initial upload will take you to the overview screen. The submission has not yet been submitted; it is in a Draft form and must be completed in order to be officially submitted.



2. Tab to the Application screen and complete required fields identified by red *.
3. Once the required fields are completed the Submit button will be activated, Click on the Submit button located in the top right hand portion of the screen.
4. Attach loss runs and Experience Modifier Worksheet using the Collaboration Toolbar above the Submit button.
5. Your submission is complete. You will receive an email confirmation from underwriting once it is determined that the market is clear.

If you have any questions or need help with a submission, please call your Amerisafe Marketing Associate at 800-897-9719

Arbella Insurance Group Agents

Arbella has enabled Policy, Billing, and Claim Inquiry for MA CL Auto and PL Auto, Home, and Dwelling Fire, and Company Web site access.

1. From within Client Activity, locate a valid Arbella policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.
4. Select the policy from the list.
5. Click Finish.
6. The first time a user processes an inquiry, an ID and Password for Arbella will be requested and stored. These must be entered in order to proceed. If you have questions about your Arbella ID or Password, please contact Arbella Support at 1-866-885-3882.
7. A request is sent directly to Arbella via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

ATLANTICAMERICAN
PROPERTY AND CASUALTY COMPANIES
ASSOCIATION CASUALTY
GEORGIA CASUALTY

Atlantic American/Association Casualty Agents

Association Casualty has enabled Billing Inquiry, Claim Inquiry, and Loss Run Inquiry for Commercial Lines.

1. From within Client Activity, locate a valid Association Casualty policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Billing Inquiry, Claim Inquiry, or Loss Run Inquiry.
4. Click Finish.
5. A request is sent directly to Association Casualty via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.
6. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

ATLANTICAMERICAN
® PROPERTY AND CASUALTY COMPANIES
ASSOCIATION CASUALTY
GEORGIA CASUALTY

Atlantic American/Georgia Casualty Agents

Georgia Casualty has enabled Billing Inquiry, Claim Inquiry, Loss Run Inquiry, and Website Sign-on for Commercial Lines.

1. From within Client Activity, locate a valid Georgia Casualty policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claim Inquiry, Loss Run Inquiry, or Company web site.

4. Click Finish.

5. The first time a user processes a Company web site request, an ID and Password for Georgia Casualty will be requested and stored. These must be entered in order to proceed. If you have questions about your Georgia Casualty ID or Password, please contact Georgia Casualty’s Marketing Department at 800-282-0480 ext. 5703

   There is no ID and Password configuration required for the Billing Inquiry, Claim Inquiry, or Loss Run Inquiry transactions.

6. A request is sent directly to Georgia Casualty via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.

7. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Auto Club Group /AAA - Michigan (IL, IN, MN, IA, WI Agents)

Auto Club Group/AAA - Michigan has enabled auto and home (not including mobile home) billing inquiry for their agents.

They've also enabled Auto and Home for Quote Bridge in all states, as well as enabling Auto Quote in the state of MN.

1. From within Client Activity, locate a valid personal lines customer.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of valid transactions and select Billing Inquiry, or Rate.
4. Select the Policy from the list.
5. Click Next.
6. If rating, make sure that Auto Club Group appears within the list of selected carriers.
7. Click Finish.
8. A request is sent directly to the company via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
9. To view additional information for this customer, click the "click here to connect to ACG portal" link, which can be found on the transaction results screen, to be connected directly into the ACG sales and service portal.
10. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.



Berkley Mid-Atlantic Group, LLC Agents

Berkley Mid-Atlantic Group, LLC has enabled Billing Inquiry, Policy Inquiry, Claims Inquiry, and BOP, Property, GL, Auto, and Work Comp bridge for commercial lines.

1. From within Client Activity, locate a valid customer, prospect, or Berkley Mid-Atlantic Group policy.

2. Click on the “Blue Butterfly” in the tool bar.

3. Select from the available transactions Rate, Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. If Rate has been selected, make sure Berkley Mid-Atlantic Group appears within the list of selected carriers.

6. Click Go.

7. The first time a user processes an inquiry, an ID and Password for Berkley Mid-Atlantic Group will be requested and stored. These must be entered in order to proceed. If you have questions about your Berkley Mid-Atlantic Group ID or Password, please contact our Agency Technical support line 1-877-BMAG -1 ST / 1-877-262-4178

8. For Rating, all information is sent directly to Berkley Mid-Atlantic Group via Transformation Station, and you will be logged into BMAG’s web site. Proceed through BMAG’s quoting screens to receive a rate. For all other transactions, a request is sent directly to BMAG via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.

9. After closing out of the “Real-Time Interface” window, you will be given the opportunity to fill out an activity on their Applied System.

Private Client Group has enabled ePCG access for Quote Upload and Policy Inquiry, for Homeowners, Auto, Collections, and Excess Liability policies.

To Upload a Quote:

1. Click **Clients & Files**.
2. Select **Customers** from the drop down.
3. Double-click the customer who has the policy to be uploaded.
4. Select the policy and click the Real-Time Butterfly.
5. Select **Rate**. Select **Prod**. Click **Go**.

   The system will connect to ePCG. The first time this service is invoked, TAM will prompt for you for a User ID and password. Use your **ePCG login and password**. This login/password pair will be saved on the Applied server and will not be prompted again. However, since ePCG passwords are required to be changed in every 90 days, you must keep both passwords synchronized.

6. (You'll be taken directly to the **Quote** tab in ePCG.)
7. On the **Quote** tab, in the **Move to**: drop down, choose **Data Gathering** and click **Go**. Check the quote. Adjust if needed.
8. Exit ePCG. You will return to the **Rating Results** screen in TAM. You may now **Accept** or **Reject** the application.

If you have questions about your ePCG User ID and Password:

For ePCG Password Resets, call 1-800-947-8753

For assistance with ePCG, contact your Broker Support Team:

Eastern Zone—866-856-6858 Option #5

Central Zone—800-613-5207 Option #2

Western Zone—866 304-5047 Option #2

To configure your ePCG Agency Code in TAM:

1. Click **Clients and Files**.
2. Select **Companies** from the drop down.
3. Select **AIG** and then click the **Options** button
4. Select **Agency Codes** from the popup menu.
5. Complete the **Company Agency Codes** screen. Make sure you enter your 5-digit agency code in the **Code** field and then click **Update**.

To configure your password in Local Security Products:

1. Click the **Real-Time** butterfly to start the **Real-Time Interface**.
2. In the **File** menu, select, **Local Security Products…**
3. Select one (or more) products and click **Edit**.
4. Enter your **ePCG** User ID and password and click **OK**.

To configure AIG as the ICO for your products:

1. Click the **Real-Time** butterfly to start the **Real-Time Interface**.
2. In the **File** menu, select, **Account Update Wizard…**
3. Select one (or more) products and click **Enter Code…**
4. Type **AIG** and click **OK**.
5. Click **Finish**.

Celina Insurance Agents

Celina Insurance Group has enabled their agents for Claims, Billing and Policy Inquiry.

Agents are required to have TAM v.6.3 and higher.

1. From the Client Activity, locate a valid customer.
2. Select “Real-Time Interface” from the Options button.
3. Drop down the list of valid transactions and select Claims. Billing or Policy inquiry.
4. Select the policy from the list.
5. Click Next.
6. Make sure that Celina Insurance appears within the list of selected carriers.
7. Click finish.
8. The first time a user processes an inquiry, a Celina Agent Center User-Id and Password will be requested and stored. Thus User-Id and Password must be entered to proceed. If you have questions about your Celina User-Id or Password, please contact the Celina Insurance Group Help Desk at 419-586-5181.

    a. A request is sent directly to Celina Insurance Group via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.

    b. A browser will be launched at the desktop and the user will be placed within Celina’s website to complete their inquiry.

    c. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on the Applied System.

Central Insurance Agents

Central Insurance Companies has enabled Auto, Home, Dwelling, and Umbrella quote bridging. The endorsement bridge is also available for Auto and Home.

Company web site, Billing, Claims and Policy inquiry are available for both Personal and Commercial Lines.

1. From within Client Activity, locate a valid customer or prospect, or a valid Central policy.

2. Click on the “Blue Butterfly” in the toolbar.

3. From the list of transactions select Rate, Billing Inquiry, Claims Inquiry, or Policy Inquiry.

4. Select the policy from the list.

5. If Rate has been selected, make sure Central Insurance appears within the list of selected carriers.

6. Click Go.

7. The first time a user processes an inquiry or rate, an ID and Password for Central will be requested and stored. These must be entered in order to proceed. If you have questions about your Central ID or Password, please contact Central’s Technology Support Department at 800-786-4628.

8. For rating, all policy information is sent directly to Central Insurance via Transformation Station, and you will be logged into Central’s web site. Proceed thru Central’s quoting screens to receive a rate. For all other transactions, a request is sent directly to Central Insurance via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.

9. After closing out of the “Real-Time Interface” window, the agent will be given the opportunity to fill out an activity on their Applied System.

Chubb Personal Lines Agents

Chubb has enabled Billing, Claims, Policy Inquiry, and Company Web site access for their Personal and Commercial agents.

1. From within Client Activity, locate a valid Chubb policy.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry, or Company Web site.
4. Select the policy from the list. *Make sure that the policy is assigned to Chubb.
5. Click Finish.
6. The first time a user processes an inquiry, a @chubb ID and Password will be requested and stored. This ID and Password must be entered in order to proceed. If you have questions about your @chubb ID or Password, please contact the Chubb Customer Care Team at 1.866.324.8222, or via e-mail at customercare@chubb.com.
7. After the request is processed, the response is sent back to the agent's desktop.
8. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity on their Applied System.
9. For additional information regarding Chubb's Personal Policy Inquiry transaction, click on the document link below:
10. http://www.appliedsystems.com/transformation/documents/chubbuserguide.pdf



The Cincinnati Insurance Companies have enabled Company Web site access for all of their agents.

1. From within Client Activity, locate a valid Cincinnati Insurance Companies policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Company Web site.
4. Select the policy from the list.
5. Click Finish.
6. The first time a user processes an inquiry, an ID and Password for The Cincinnati Insurance Companies’ website, CinciLink, will be requested and stored. These must be entered in order to proceed. If you have questions about your CinciLink ID or Password, please contact The Cincinnati Insurance Companies’ Agency Support Line at (513) 870-2255 or e-mail support@cinfin.com.
7. A request is sent directly to CinciLink via Transformation Station. Once the request is processed, the user will be logged into CinciLink.
8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.



CNA Insurance Agents

CNA Insurance has enabled their agents for Billing, Claims, and Policy Inquiry, Company Website, and Business Owners, Workers Compensation, and Commercial Auto Rating.

1. From within Client Activity, locate a valid CNA policy.
2. Select “Real-time Interface” from the Options button.
3. Select the policy from the list.
4. Select Billing Inquiry, Claims Inquiry, Policy Inquiry, Company Website, or Rate. If Rate is selected, select the appropriate ID and Name for the line of business selected.
5. Click Go.
6. The first time a user processes a transaction from Transformation Station, an ID and Password for CNA Central must be entered in order to proceed. If you have questions about your CNA Central ID or Password, please contact CNA’s Agency Help Desk at 1-800-CNA-HELP (1-800-262-4357).
7. A request is sent directly to CNA via Transformation Station. Navigate through the CNA screens to complete your request. Once the request is complete, you will receive a fully bindable quote and you will have the opportunity to generate a proposal letter.
8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System. (updated 6/13/2011)

Columbia Insurance Group Agents

Columbia Insurance Group has enabled Billing Inquiry, Claims Inquiry, and Company Web site for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Columbia policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, or Company Web site.
4. Select the policy from the list.
5. Click Finish.
6. The first time a user processes an inquiry, an ID and Password for Columbia will be requested and stored. These must be entered in order to proceed. If you have questions about your Columbia ID or Password, please contact Columbia’s Agency Support Line at <Phone NumbHelp Desk at 1-800-877-3579 extension 1850.>.
7. A request is sent directly to Columbia via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Commerce Insurance Company Agents

Commerce has enabled Billing Inquiry and Claims Inquiry for all agents writing Personal Lines and Commercial Lines business. Company Web site access is also available.

1. From within Client Activity, locate a valid Commerce customer or policy.

2. Select “Real-Time Interface” from the Options button, or Click the Blue Butterfly.

3. Highlight the desired policy from the policy list.

4. Select the radio button for Billing Inquiry, Claim Inquiry or Company Web site.

5. Click Go.

6. The first time a user processes an inquiry, an ID and Password for Commerce will be requested and stored. (The ID and password entered here is the same information that you use to access the Commerce Billing & Claims Inquiry site today.) These must be entered in order to proceed. If you have questions about your Commerce ID or Password, please contact Commerce Agency Interface Support at 1-800-286-1000.

7. A request is sent directly to Commerce via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.

8. After closing out of the Real-Time Interface program, the agent will be given the opportunity to fill out an activity on their Applied system.



Companion Property & Casualty Group

Companion Property & Casualty Group has enabled Policy, Billing, and Claim Inquiry in addition to First Notice of Loss for Liability, Property, and Work Comp claims. The transactions are available for all lines of business and all states. Effective 6/27/06, Companion Property & Casualty Group offers Rating of Work Comp policies via a Bridge to their website.

1. From within Client Activity, locate a valid Companion policy. For Rate, locate a valid Work Comp policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select the desired Inquiry type, 1st Notice of Loss, or Rate.

4. Select the policy from the list.

5. If 1st Notice of Loss is selected, click Next and select the appropriate loss notice, otherwise proceed to step 7.

6. If Rate is selected, choose Companion Group Work Comp from the list of available carriers.

7. Click Finish.

8. A request is sent directly to Companion via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

9. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

EMC Insurance Companies Agents

EMC has enabled a variety of real-time interface services with Applied Systems, including:

- Policy Inquiry (PL, CL)
- Billing Inquiry (PL, CL)
- Claim Inquiry (PL, CL)
- Endorsement Bridge (PL)
- Loss Run Inquiry (CL)
- First Notice of Loss Upload (Auto, Property)
- Personal Auto Rate (Bridge & RTR)
- Homeowners Rate (Bridge & RTR)
- Businessowners Rate (RTR)
- Carrier Sign-on

Before you utilize these helpful services, be sure to enter your EMC user ID and password into your Applied System if you're managing them locally. To streamline the password management process, EMC offers Password Synchronization (iDNA). This tool ensures that your EMC Agent Access credentials are always in synchronization with your management system – making the real time experience even easier. For more information, please refer to the Password Sync FAQs under My Account in Agent Access or contact EMC Agency & Internet Support.

<u>To process a Policy, Billing, Claim, or Loss Run Inquiry:</u>
1. Choose an EMC client.
2. Click on the Real-Time blue butterfly icon.
3. Select the type of Inquiry you desire and hit Go.
4. You will be logged into EMC's *Agent Access* automatically and taken directly to that client's Policy Inquiry, Billing Inquiry or Claim Inquiry screen.
5. After closing the browser, you can complete the activity detail screen in your Applied System.

<u>To process an Endorsement:</u>
1. Choose an EMC client.
2. Click on the Real-Time blue butterfly icon.
3. Select Endorsement under Transaction Options and hit Go.
4. You will be logged into EMC's *Agent Access* automatically and taken directly to the Policy Change screen, with the ability to Rerate the policy when finished.
5. After closing the browser, you can complete the activity detail screen in your Applied System.

<u>To process a First Notice of Loss Upload;</u>
1. Enter claim information detail.
2. Click on the Real-Time blue butterfly icon.
3. Choose 1st Notice of Loss from the transaction options and select Go.

4. A claim number will be returned to your system.

To process a Personal Auto or Homeowners Rating Bridge:
1. Choose any client.
2. Click on the Real-Time blue butterfly icon.
3. Select the line of business you'd like to quote, choose EMC from the company list, and highlight Rate. Then hit Go.
4. You will be logged into EMC's *Agent Access* automatically and taken directly to the Quote Personal Lines process. The client information will transfer into the quoting screens, eliminating the need to re-enter it. After the information bridged over is verified for accuracy, the quote is completed in *Agent Access*.
5. After closing the browser, you can complete the activity detail screen in your Applied System.

To process a Personal Auto, Homeowners, or Businessowners Real Time Response Rate:
1. Choose any client.
2. Click on the Real-Time blue butterfly icon.
3. Select the line of business you'd like to quote, choose EMC from the company list, and highlight Rate. Then hit Go.
4. Fill out the company-specific questions displayed.
5. The rate is returned to your system, along with a quote proposal. A remarks page is included in the proposal, outlining any items that were modified during the rating process. Use the link provided to navigate into Agent Access to revise the quote, continue to application, etc.

Log into Agent Access and select Agency Connectivity from the Reference tab for the most up-to-date information. If you have any questions about using Transformation Station with EMC, please contact the EMC Internet and Agency Help Desk at 1 (877) 249-0581 or via email at Agency.Internet.Help@EMCIns.com . (Updated 6/13/2011)

Encompass Insurance Personal Lines Agents

Encompass Insurance has enabled ALL personal lines agents for Billing, Policy, Claim, Loss Run Inquiry, and Company Web site access.

They have also enabled Auto and Home for Quoting Bridge for personal lines and endorsement navigation.

1. From within Client Activity, locate a valid personal lines customer.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of valid transactions and select Billing Inquiry, Policy Inquiry, Claim Inquiry, Loss Run Inquiry, Company Web site or Rate.
4. Select the Policy from the list.
5. Click Next.
6. If rating, make sure that Encompass Insurance appears within the list of selected carriers.
7. Click Finish.
8. The first time a user uses each transaction, an ID and Password for Encompass will be requested and stored. These must be entered in order to proceed. If you have questions about your Encompass ID or Password, please contact Encompass' Help Desk at 1-800-262-9262.
9. A request is sent directly to Encompass Insurance via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
10. If rating, a Website Link will appear to allow a bridge to Encompass Insurance. Click the link to be automatically sent to Encompass' website in order to complete the quote.
11. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.

Farmers Mutual of Nebraska Agents

Farmers Mutual of Nebraska has enabled ALL personal lines agents for Billing, Claims, and Policy Inquiry, and Company Web site access.

1. From within Client Activity, locate a valid Farmers Mutual policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. Click Finish.

6. A request is sent directly to Farmers Mutual via Transformation Station. After the request is processed, you will be automatically taken to the requested information on the Farmers Mutual website.

7. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Fireman's Fund Insurance Company
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Fireman's Fund Insurance Company Agents

Fireman's Fund has enabled First Notice of Loss for Automobile, Liability, Property, and Workers Compensation for their Applied TAM agencies on versions 7.2 and above.

To gain access to Fireman's Fund Online Claims Reporting through Applied TAM, you will need to be set up for access to the Fireman's Fund Agent Desktop. If you are not already set up for this access, or need your password reset, see your agency administrator, or call the Fireman's Fund e-Business Support Center at 1.866.FUND WEB (1.866.386.3932).

The first time a user processes a First Notice of Loss, the Fireman's Fund Agent Desktop ID and Password will be requested and stored. These must be entered in order to proceed. You can opt to set the ID and Password ahead of time by selecting Local Security Products from the File menu within the Real-Time Interface.

1. From within Client Activity, locate a valid Fireman's Fund customer, policy, or claim.
2. Select "Real-time Interface" from the Options button, or click the Blue Butterfly icon in the toolbar.
3. Select 1st Notice of Loss from the Transaction Options.
4. Select the applicable loss from the list.
5. If you would like to add file attachments (e.g. photo, police report, or other relevant documentation), click on the attachments link to open the attachments interface. Attachments are limited to approximately 1.5 meg at this time. Click OK when complete.
6. Click the green Go! button.
7. Complete the questions on the edit screens and click Process.
8. A request is sent directly to Fireman's Fund via Transformation Station. After the request is processed, the response is sent back to the agent's desktop including the assigned claim number.
9. After closing out of the "Real-Time Interface" program, you will be given the opportunity to fill out an activity within the Applied System.
10. After the claim is processed by Fireman's Fund, you will receive a detailed acknowledgment, including adjuster contact information, by e-mail.

For assistance with Applied TAM, contact Applied Customer Support at 800.999.6512.

For assistance with Fireman’s Fund Online Claims Reporting, or to report your claim by phone, please call 1.888.FIREHAT (1.888.347.3428).

Frankenmuth Insurance Agents

Frankenmuth Insurance has enabled Policy, Billing, and Claim Inquiry for their agents.

1. From within Client Activity, locate a valid Frankenmuth Insurance Policy.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of valid transactions and select “Policy Inquiry”, “Billing Inquiry”, or “Claim Inquiry”.
4. Select the Policy from the list. *Make sure that the policy is assigned to Frankenmuth Insurance.
5. Click Finish.
6. A request for the Inquiry is sent directly to the company via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
7. To view the response, click the "Proposal" or “Attachment” button.
8. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.



Fremont Insurance Agents

Fremont Insurance Company has enabled Personal Auto Rating, as well as Billing Inquiry, Claims Inquiry,
and Policy Inquiry for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Fremont Insurance Company policy.

2. Select “Real-time Interface” from the Options button or from the Blue Butterfly icon in the toolbar.

3. Select from the list of transactions.

4. Select the policy from the list.

5. Click Go.

6. The first time a user processes an inquiry, an ID and Password for Fremont will be requested and stored. These must be entered in order to proceed. If you have questions about your Fremont ID or Password, please contact Fremont’s Agency Support Line at 1-888-968-3664.

7. A request is sent directly to Fremont via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Applied Instructions on Uploading an Application

Use the below steps to use Applied Agency Management Systems to complete an upload to Amerisafe.

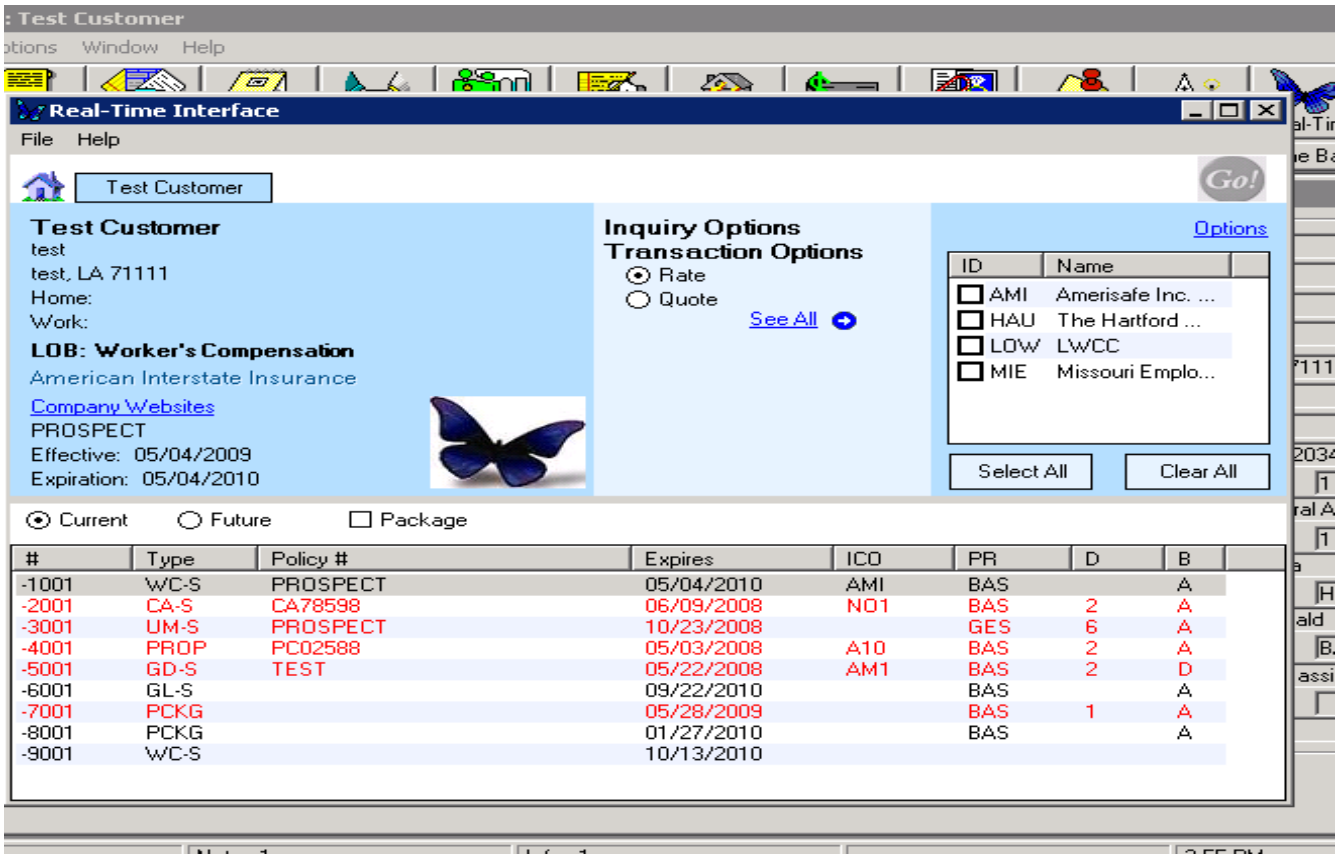
4. Select the customer from your Clients and Files list.

5. Click the blue butterfly in your Applied toolbar.

6. Select the Work Comp app in the Real-Time Interface that you intend to bridge to Amerisafe.

7. Check the Amerisafe checkbox and click Go. If Amerisafe does not appear as an option, please contact your system administrator or your Amerisafe Marketing Associate for Help.

Any questions regarding the above process can be answered by calling Applied Systems customer support @ 800-999-6512. Remember to choose option 4 when calling.



After the transaction is finished processing, an internet browser will open to the Geaux Workstation. Instructions for completing the submission within Geaux are located on the reverse side of this guide. *The application has not yet been submitted; it is in a Draft form and must be completed in order to be officially submitted*

Grange Insurance Agents

Grange Mutual has enabled their personal and commercial lines agents for Billing, Policy, Claim, and Loss Run Inquiry.

They have also enabled Personal Lines for Auto and Home real time Quoting, and a Bridge for policy issuance. This is available in the following states: OH, KY, IN, IL, TN, GA and MI.

1. From within Client Activity, locate a valid customer.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of valid transactions and select Billing Inquiry, Policy Inquiry, Claim Inquiry, Loss Run Inquiry, or Rate.
4. Select the policy from the list.
5. For Inquiry transactions, Click Finish.
6. For Quoting, Click Next.
7. Make sure that Grange appears within the list of selected carriers.
8. Click Finish.
9. A request is sent directly to Grange Mutual via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
10. If rating, the quoted premiums for the policy and coverage's will appear along with a Website Link to the policy on GAINWeb. Click the link to be automatically sent to Grange's website in order to do any policy function (print, quote and upload).
11. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity on their Applied System.

Grinnell Mutual Agents

Grinnell Mutual Reinsurance Company has enabled Billing Inquiry, Policy Inquiry, Claim Inquiry, and Loss Run Inquiry for Personal Lines.

1. From within Client Activity, locate a valid Grinnell Mutual policy.
2. Select “Real-time Interface” from the Options button, or Click the Blue Butterfly.
3. Select Billing Inquiry, Policy Inquiry, Claim Inquiry, or Loss Run Inquiry.
4. Click Finish, or the Green Go button.
5. A request is sent directly to Grinnell Mutual via Transformation Station. The request is processed immediately. A PDF is returned for Loss Run Inquiry, and the user is automatically taken direct to the policy information on the Grinnell Mutual Website for Billing Inquiry, Policy Inquiry, and Claim Inquiry.
6. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.



Hartford Personal & Commercial Lines Agents

The Hartford offers its agents the following Real-Time solutions:

Transaction Options (for New Business)

- Small Commercial Quoting for Spectrum® (BOP), Auto and Workers' Comp
- Personal Lines Rating for Auto and Homeowners

Inquiry Options for Commercial and Personal Lines *(* Commercial Lines only)*

- Policy Inquiry
- Claim Inquiry
- Billing Inquiry, including Bill Copy
- Loss Run Inquiry*
- 1st Notice of Loss, with attachments* (Auto, Property, General Liability, and Workers' Comp)

Company Web Site quick link to the Electronic Business Center (EBC®)

To use Real-Time:

1. From within Client Activity, locate a valid Hartford Commercial or Personal Lines policy.

2. Select "Real-Time Interface" from the Options button.

3. Drop down the list of transactions and select one of the services: Quote, Billing Inquiry, Policy Inquiry, Claim Inquiry, Loss Run Inquiry, or 1st Notice of Loss.

4. Select the policy from the list. Make sure the policy is assigned to The Hartford.

5. Click Finish.

6. The first time a user processes an inquiry, the ID and Password for The Hartford's EBC carrier site will be requested. These must be entered in order to proceed. Also, corresponding "Authorization Levels" for inquiries are required. If you have any questions about your EBC ID, Password or Authorization Levels, please contact The Hartford's Agency Interface Services help desk toll free at 877-322-4833.

7. The request is sent directly to The Hartford and the results will appear in a new window on your screen.

Indiana Farmers
MUTUAL INSURANCE COMPANY
Integrity • Security • Stability • Service

Indiana Farmers Mutual Insurance Company Agents

Indiana Farmers Mutual has enabled First Notice of Loss, Billing Inquiry, Claims Inquiry, Policy Inquiry and/or Company Web site for Personal Lines, Farm Lines and Commercial Lines.

1. From within Client Activity, locate a valid Indiana Farmers Mutual policy.

2. Select “Real-time Interface” from the Options button or from the Blue Butterfly icon in the toolbar.

3. Select from the list of transactions Billing Inquiry, Claims Inquiry, Policy Inquiry, and/or Company Web site.

4. Select the policy from the list.

5. Click Go.

6. The first time a user processes an inquiry, an ID and Password for Indiana Farmers Mutual will be requested and stored. These must be entered in order to proceed. If you have questions about your Indiana Farmers Mutual ID or Password, please see the Indiana farmers Mutual Transformation Station “help Page” @ https://www.indianafarmers.com/AgentsOnly/tstationfaqs.aspx, or contact Indiana Farmers Mutual Agency Transformation Station Support Line (Sherry Townsend) at 317-846-4211.

7. A request is sent directly to Indiana Farmers Mutual via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Jimcor has enabled the Company Web site transaction.

1. If you have a popup blocker turned on please update your settings to allow popups from the following websites.
    - jimcor.com
    - usli.com
    - augold.com

2. Then from the Customers screen select “Real-time Interface” from the Options button or from the Blue Butterfly icon in the toolbar.

3. Select from the list of transactions Company Web site and select Jimcor Website.

4. Click Go.

5. The first time a user processes a transaction, an ID and Password for Jimcor will be requested and stored. These must be entered in order to proceed. If you have questions about your Jimcor ID or Password, please contact Jimcor’s Agency Support Line at 800 334-0474 x1300.

6. A request is sent directly to Jimcor via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

7. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

LWCC Agents

LWCC has enabled Workers Compensation rating for the state of Louisiana:

1. From within Client Activity, locate a valid commercial lines customer.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Rate.
4. Select the policy from the list.
5. Click Next.
6. Make sure that LWCC appears within the list of selected carriers.
7. Click Finish.
8. A request for the Quote is sent directly to LWCC via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
9. A link will be launched to allow a bridge to LWCC’s website.
10. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Main Street America Group – Commercial Agents
National Grange – CT, DE, GA, MA, MD, ME, NC, NH, NY, PA, RI, SC, TN, VA, and VT

National Grange Mutual has enabled Business Owners and Contractors Quoting for:
*** CT, DE, GA, MA, MD, ME, NC, NH, NY, PA, RI, SC, TN, VA, and VT Agents***

1. Your Agency Code must be set up correctly. It must be 6 digits without any spaces or dashes.

2. From within Client Activity, locate a valid customer or prospect.

3. Under the Policy Detail in the Applied System you must have your policy set up as a Business Owners Policy.(BOP)

4. On the Applicant Info Screen, you must enter a valid GL (NGM) Class Code and a valid Nature of Business code:

   - AP-Apartment Program
   - CT-Contractor Program
   - OF-Office Program
   - RL-Retail Program
   - SV-Service Program
   - WL-Wholesale Program

5. On each Location Premises Screen, you must enter:
   - The Location Number and the Building Number
   - The Location State
   - The Protection Class and the NGM Rating Territory

6. On each Location Business Screen, you must:
   - Select the Nature of Business
   - Enter a valid matching Class Code

7. On each Location Property Screen, you must:
   - Enter a Building or Personal Property Limit for Business Owner Policies only.

8. You must enter a Liability Amount as either:
   - The Combined Single Limit
   - The Occurrence Limit

9. Select “Real-time Interface” from the Options button.

10. Drop down the list of valid transactions and select “Rate”.

11. Select the Policy from the list.

12. Click the Next button and select NGM within the list of selected carriers.

13. Click the Finish button.

14. A request for the Quote is sent directly to NGM via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.

15. To view the response:

- You can click the “Attachment” button and you will get the Adobe Quote Proposal
- You can click the “Proposal” button and you will get a summary of the quote
- You can click on the URL Link on the lower left hand corner and that will bring you into our website directly to your quote.

16. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity.

17. If your agency needs to contact MSA Group’s help desk, please call 866-801-6496.

Main Street America Group – Personal Agents

National Grange – CT, DE, GA, MA, MD, ME, NC, NH, NY, PA, RI, SC, TN, VA, and VT

National Grange Mutual has enabled Personal Auto and Homeowners Quote Submission for:
*** CT, DE, GA, MA, MD, ME, NC, NH, NY, PA, RI, SC, TN, VA, and VT Agents***

1. Your Agency Code must be set up correctly. It must be 6 digits without any spaces or dashes.

2. From within Client Activity, locate a valid customer or prospect.

3. Select “Real-time Interface” from the Options button.

4. Drop down the list of valid transactions and select “Rate”.

5. Select the Policy from the list.

6. Click the Next button and select NGM within the list of selected carriers.

7. Click the Finish button.

8. A request for the Quote Submission is sent directly to NGM via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.

9. To view the response:

   - You can click the “Attachment” button and you will get the Adobe Quote Proposal
   - You can click the “Proposal” button and you will get a summary of the quote
   - You can click on the URL Link on the lower left hand corner and that will bring you into our website directly to your quote.

10. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity.

If your agency needs to contact MSA Group’s help desk, please call 866-801-6496.

Maine Employers Mutual Agents

Maine Employers Mutual has enabled Policy Inquiry, Billing Inquiry, Claims Inquiry and Company Web site for Commercial Lines.

1. From within Client Activity, locate a valid Maine Employers Mutual policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for Maine Employers Mutual will be requested and stored. These must be entered in order to proceed. If you have questions about your Maine Employers Mutual ID or Password, please contact the Agency Services Coordinator at 207-791-3559.

7. A request is sent directly to Maine Employers Mutual via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

MetLife Auto & Home Agents

MetLife Auto & Home has enabled Policy, Billing and Claims Inquiry for Personal Lines for the following states AL, AR, AZ, CA, CO, CT, FL, GA, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MO, MS, MT, NC, ND, NE, NH, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, WA, WI, WY.

1. From within Client Activity, locate a valid MetLife policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, or Policy Inquiry.
4. Select the policy from the list.
5. Click Finish.
6. The first time a user processes an inquiry, an ID and Password for MetLife will be requested and stored. These must be entered in order to proceed. If you have questions about your MetLife ID or Password, please contact MetLife’s Agency Support Line at 800-255-0332.
7. A request is sent directly to MetLife via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.



Mutual Benefit Group Agents

Mutual Benefit Group has enabled Company Web site access for all agencies.

1. From within Client Activity, locate a valid Mutual Benefit Group policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Company Web site.
4. Select the policy from the list.
5. Click Finish.
6. The first time someone within your agency processes an inquiry, an ID and Password for Mutual Benefit Group Agency Website will be requested and stored. These must be entered in order to proceed. Should you have questions about your Mutual Benefit Group ID or Password, please contact Mutual Benefit Group’s Agency Support Line at (800) 283-3531 extension 2224 or 2226.
7. A request is sent directly to the Mutual Benefit Group Agency Website via Transformation Station. Once the request is processed, you will be logged into the Mutual Benefit Group Agency Website.
8. After closing out of the “Real-Time Interface” program, you will be given the opportunity to fill out an activity on your Applied System.

New London County Insurance Companies Agents

New London County Insurance Companies has enabled Billing, Claims and Policy Inquiry for Personal and Commercial lines in all states.

1. From within Client Activity, locate a valid New London County policy.

2. Select “Real-Time Interface” from the Options button.

3. Drop down the list of valid transactions and select the appropriate Inquiry transaction desired.

4. Select the policy from the list. *Make sure that the policy is assigned to New London County.

5. Click Finish.

6. The first time a user attempts a transaction, they will be prompted to input their New London County ID and Password. If you require assistance with the ID and Password, please contact the New London County Help Desk at 860-877-3533 ext 4226, or nlchelpdesk@nlcinsurance.com.

7. A request for the transaction is sent directly to New London County via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity.

New York Central Mutual Agents

New York Central Mutual has enabled Billing Inquiry and Company Web site access for personal lines.

1. From within Client Activity, locate a valid New York Central Mutual policy.

2. Select "Real-time Interface" from the Options button.

3. Drop down the list of valid transactions and select “Billing Inquiry” or “Company Web site”.

4. Select the Policy from the list. *Make sure that the policy is assigned to New York Central Mutual.

5. Click Finish.

   A request for the Inquiry is sent directly to the company via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.

6. To view the Billing inquiry response, click the "Proposal" or “Attachment” button.

7. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.

Norfolk and Dedham Agents

The Norfolk & Dedham Group has enabled Billing Inquiry, Claims Inquiry, Policy Inquiry, and Company Web site for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid The Norfolk & Dedham Group policy.
2. Select “Real-time Interface” from the Options button, or click on the Blue Butterfly icon in the toolbar.
3. Select from the list of transactions Billing Inquiry, Claims Inquiry, Policy Inquiry, or Company Web site.
4. Select the policy from the list.
5. Click Go.
6. A request is sent directly to The Norfolk & Dedham Group via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
7. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Ohio Casualty Group Personal & Commercial Lines Agents

Ohio Casualty Group has enabled Billing & Loss Run Inquiries for personal & commercial lines.

1. From within Client Activity, locate a valid Ohio Casualty Group Policy.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of valid transactions and select either “Billing Inquiry” or “Loss Run”.
4. Select the Policy from the list. *Make sure that the policy is assigned to Ohio Casualty Group.
5. Click Finish.
6. A request for the Inquiry is sent directly to Ohio Casualty Group via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
7. To view the response, click the "Attachment" button.
8. A list of the attachments received is presented. Select the attachment, and click the "View" button.
9. Adobe Acrobat (if installed) will be launched and the Inquiry will be presented.
10. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.



Pekin Insurance Company Agents

Pekin Insurance Company has enabled Policy Inquiry, Billing Inquiry, Claims Inquiry and Company Web site for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Pekin policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for Pekin Insurance will be requested and stored. These must be entered in order to proceed. If you have questions about your Pekin ID or Password, please contact Pekin’s Agency Support Line at 1(800) 322-0160 ext 2757.

7. A request is sent directly to Pekin Insurance via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

PENN NATIONAL INSURANCE

Penn National Insurance Company

Penn National Insurance has enabled Company Web site, Billing, Policy, Loss Run and Claims Inquiry for personal and commercial agents. They have also enabled Personal Auto and Home Rating Bridge and Endorsement transactions for Personal Lines agents, and Commercial Auto, BOP, and Work Comp Rating Bridge for Commercial Lines agents.

1. If you are not currently using Transformation Station, run the Real-Time Configuration Utility and Account Update to configure your transactions and PennConnect user id and password login information. If you do not have PennConnect access, your agency administrator can set those up by contacting Penn National Insurance's Customer Contact Center at 1-800-766-2245.

2. For inquiry transactions, locate a valid Penn National Insurance client or policy.

3. Click on the Blue Butterfly (Real-time Interface) or select it from the Options menu.

4. Select the transaction to be processed or click on the Company Web sites link to select Penn National Insurance and use the green "***GO***" button to send your request.

5. If you are bridging to personal lines rating, you will either receive an HTML page with a completed quote or a message that there were errors in rating, both of which will contain a link that will take you directly into the quote in our rating system. If you are bridging to commercial lines rating, you will receive an HTML page, but will be taken directly into the quote in our rating system.

6. Once you have linked to the new business quote, you may make changes and rerate or correct entry errors to obtain a quote. You may also complete the application and submit to the company.

7. When doing an endorsement transaction, you may quote and submit your endorsement while logged in via Transformation Station.

8. If you have any problems when quoting new business or endorsements, please contact the agency interface department at 1-800-388-4764 ext. 6873.

9. After closing out of the "Real Time Interface" program, there will be an opportunity to complete an activity on the agent's system.



Preferred Mutual Insurance Agents

Preferred Mutual has enabled Billing, Claims and Policy Inquiry, Company Web site access and Endorsement bridge transactions for their agencies.

1. From within Client Activity, locate a valid Preferred Mutual policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry, Company Web site or Endorsement.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for Preferred Mutual’s Agency website will be requested and stored. These must be entered in order to proceed. If you have questions about your Preferred Mutual ID or Password, please contact Preferred Mutual at (800) 333-7642.

7. A request is sent directly to the Preferred Mutual Agency Website via Transformation Station. Once the request is processed, the user will be logged into Preferred Mutual’s Agency Website.

   After closing out of the “Real-Time Interface” program, the user will be given the opportunity to fill out an activity on their Applied System.

Progressive Personal Line Agents

Progressive has enabled Billing, Claim Inquiry, Policy Inquiry, and Make Payment for personal lines.

1. From within Client Activity, locate a valid Progressive policy.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of valid transactions and select "Billing Inquiry", “Claim Inquiry”, “Policy Inquiry”, or “Make Payment”.
4. Select the Policy from the list. *Make sure that the policy is assigned to Progressive.
5. Click Finish.
6. A request for the transaction is sent directly to Progressive via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
7. If the transaction was completed successfully, click on the “Proposal” button.
8. The first time that the transaction is run, the proposal will contain a link that will redirect you to Progressive’s site, where the agent must register an account.
9. Once the registration process has been completed, subsequent transactions will be displayed within the Proposal section. Several links within Progressive’s Inquiry will take you directly to their site for further viewing or processing of information.
10. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.

Safeco Personal Lines Agents

Safeco has enabled all TAM and Vision Agents for Auto and Home Rating.

1. From within Client Activity, locate a valid personal lines customer.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of transactions and select Rate.
4. Select the policy from the list.
5. Click Next.
6. Make sure that Safeco appears within the list of selected carriers.
7. Click Finish.
8. The first time a user processes a quote, an ID and Password for Safeco will be requested and stored. These must be entered in order to proceed. If you have questions about your Safeco ID or Password, please call 877-566-6001, and select Personal Insurance (Option 1), Automation Support (Option 2), then New Business Entry and Password Support (Option 2).
9. A request for the Quote is sent directly to Safeco via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
10. A Website Link will appear to allow a bridge to Safeco. Click the link to be automatically sent to Safeco's website in order to complete the quote.
11. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity on their Applied System.

For additional information regarding Safeco's quoting transactions, click on the document link below:

https://safesite.safeco.com/safeconow/Resources/Technical_Resources/PL_Bridge/personal_lines_bridge_overview.aspx

Safety Insurance Agents

Safety Insurance has enabled Billing Inquiry, Claims Inquiry, Policy Inquiry, and Company Web site for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Safety Insurance policy.
2. Select “Real-time Interface” from the Options button, or click on the Blue Butterfly icon in the toolbar.
3. Select from the list of transactions Billing Inquiry, Claims Inquiry, Policy Inquiry, or Company Web site.
4. Select the policy from the list.
5. Click Go.
6. A request is sent directly to Safety Insurance via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
7. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.



SECURA Insurance Agents

SECURA Insurance has enabled Company Web site, Billing, Claims and Policy inquiry for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid SECURA policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for SECURA will be requested and stored. These must be entered in order to proceed. If you have questions about your SECURA ID or Password, please contact SECURA Agency Automation Support Line at 800-558-3405.

7. A request is sent directly to SECURA Insurance via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Selective Insurance Agents

Selective Insurance has enabled Billing Inquiry, Claims Inquiry and Company Web Site for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Selective policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, or Company web site.
4. Select the policy from the list.
5. Click Finish.
6. The first time a user processes an inquiry, an eSelect ID and Password for Selective will be requested and stored. These must be entered in order to proceed. If you have questions about your Selective ID or Password, please contact Selective’s Agency Support Line at 1-800-777-9656 ext 1010 <Phone Number>.
7. A request is sent directly to Selective via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Society Insurance Agents

Society Insurance has enabled Company Web site, Billing, Claims and Policy inquiry for Commercial Lines.

1. From within Client Activity, locate a valid Society Insurance policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for Society will be requested and stored. These must be entered in order to proceed. If you have questions about your Society ID or Password, please contact Society’s Marketing Department at 1-888-576-2438.

7. A request is sent directly to Society via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

State Fund Mutual Agents

State Fund of MN has enabled Policy, Billing, Claim, and Loss Run Inquiry.

1. From within Client Activity, locate a valid State Fund of MN policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy or Loss Run Inquiry.
4. Select the policy from the list.
5. Click Finish.
6. A request is sent directly to State Fund of MN via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop.
7. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Summit Agents

Summit has enabled Workers' Compensation Quoting in Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, South Carolina, North Carolina and Tennessee.

1. From within Client Activity, locate a client with a valid Workers' Comp policy.
2. Select ***Real-Time Interface*** from the Options button.
3. Drop down the list of valid transactions and select ***Rate***.
4. Select the policy from the policy list.
5. Click ***Next.***
6. Select ***Summit - Workers Comp*** from the list of carriers.
7. Click ***Finish.***
8. Effective 3/20/06, the first time a user attempts a transaction, they will be prompted to input their Summit ID and Password. To request a password, go to www.summitholdings.com and click on "request a password." If you require additional assistance with the ID and Password, please contact Summit at 863-665-6060 and ask for the Help Desk or email HELP@summitholdings.com.
9. A request for the transaction is sent directly to Summit via Transformation Station. After the request is processed, the agent will be taken directly to Summit's online Business Center to complete the submission process.
10. After closing out of the ***Real-Time Interface*** program, the agent will be given the opportunity to fill out an activity.

Texas Mutual Agents

Texas Mutual Insurance Company enabled Workers' Compensation for "Rate" in Texas.

1. From within Client Activity, locate a valid Workers' Compensation customer.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of valid transactions and select "Rate".
4. Select the Policy from the list.
5. Click Next.
6. Select Texas Mutual Insurance Company from within the list of selected carriers.
7. Click Finish.
8. The Username and Password will be requested and stored. These must be entered in order to proceed. If you have questions about your *Texas Mutual*® Username or Password, please contact Texas Mutual Insurance Company at 1-800-859-5995.
9. A request is sent directly to Texas Mutual Insurance Company via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
10. After rating, an Internet browser will open to Texas Mutual Insurance Company's website to complete the quote process.
11. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.

Tower Group Agents

Tower Group Companies has enabled Personal lines Homeowners rating as well as Personal & Commercial lines Policy Inquiry. Please note that Dwelling Fire, Expanded Homeowners and Dwelling Package are not included in the rating option.

1. From within Client Activity, locate a valid Tower Group Companies policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select “Rate” or “Policy Inquiry”.
4. Select the policy from the list.
5. Click Finish.
6. The first time a user processes an inquiry, an ID and Password for Tower Group Companies will be requested and stored. These must be entered in order to proceed. If you have questions about your Tower Group Companies ID or Password, please contact Tower Group Companies’ WebPlus Help Desk at (212) 655-2069.
7. A request is sent directly to Tower Group Companies via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Travelers Commercial Lines Agents

Travelers has enabled Billing, Loss Run, and Policy Inquiries for commercial lines.

1. Prior to running the real-time transaction for the first time, contact Travelers Commercial Lines Agency Automation Help Desk at 1-800-842-2522, Option #1, to establish an account and receive further instructions.

2. STOP - Has #1 been completed? If it has not, you will be unable to use Transformation Station for Travelers.

3. From within Client Activity, locate a valid Travelers commercial lines customer.

4. Select "Real-time Interface" from the Options button.

5. Drop down the list of valid transactions and select either: “Policy Inquiry”, “Billing Inquiry”, or "Loss Run".

6. Select the Policy from the list. *Make sure that the policy is assigned to Travelers.

7. Click Finish.

8. A request for the inquiry is sent directly to Travelers via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.

9. The response should automatically be displayed. If it is not, click the “Proposal” or "Attachment" button.

10. A list of the attachments received is presented. Select the listed attachment to view the response.

11. Adobe Acrobat (if installed) will be launched and the Inquiry will be presented.

12. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.

13. The vast majority of Travelers Commercial Policies should be available for policy view; however there are exceptions for specialty lines. Travelers will be happy to assist you: Call **1-800-842-2522 option #4**.



Unigard Insurance Group Agents

Unigard has enabled the following transactions:

- **Billing Inquiry**
- **Claims Inquiry**
- **Loss Runs**

1. **For those agents located in CA or WA (or are CL only agents) who are <u>not</u> currently using Transformation Station with Unigard,** after running the Real Time Configuration Utility and the Account Update, please contact Unigard's Agency Interface Unit @ 1-800-777-1757 ext. 75-5470, for one last setup step or email agencyinterfacesupport@us.qbe.com.

2. From within Client Activity, locate a valid customer.
3. Select "Real Time Interface" from the Options Box or click on the "Blue Butterfly".
4. Select the transaction to be processed and click on the green "GO" button. Depending on the transaction selected, you will either receive back an HTML page with the requested information (inquiry) or be requested to complete Web Edit Screens (1st Notice of Loss).

5. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.

For those agents located in AZ, ID, MT, OR and UT and have PL policies on our new platform, you will follow the same steps as above, but you will be set up with IVANS iDNA product. This process will return a url to our website, rather than an HTML page as indicated above. You will need to add your Unigard User ID and Password credentials in the first time in. Once that is done, subsequent access to the Unigard website will not require manual entry of your User ID and Password, since these credentials are stored on the Real Time Server. (Updated 1/30/2012)

Union Mutual of Vermont Companies Agents

Union Mutual of Vermont has enabled the following Real-Time transactions for all applicable States and Lines of Business:

- Company Web site
- Billing / Claims / Policy Inquiry
- Personal Auto Quote Bridge (ME; NH; VT)
- Homeowners Quote Bridge (CT; MA; ME; NH; RI; VT)

1. Your Agency Code must be set up correctly. Be sure to include the leading Zero (i.e. “01234” instead of “1234”).

2. From within Client Activity, locate a valid New England Guaranty or Union Mutual Fire Insurance Company policy.

3. Click on the “Blue Butterfly”; or select “Real-time Interface” from the “Options” menu.

4. Select the intended transaction from the drop-down list of options: Billing Inquiry, Claims Inquiry, Policy Inquiry or Rate.

5. Select the policy from the list.

6. Click the “Go” or “Finish” button.

7. The first time a user processes an inquiry or rate, a User ID and Password for Union Mutual will be requested and stored. These must be entered in order to proceed. If you have questions about your Union Mutual User ID or Password, please contact our Marketing Coordinator at 1-800-300-5261 ext 504.

8. For Billing/Claims/Policy Inquiry, the request is sent directly to Union Mutual via Transformation Station. After the request is processed, the response is sent back to the user’s desktop.

9. For Rating/Quote Bridge, the policy information is sent directly to Union Mutual via Transformation Station, where it is loaded into a set of “gapping screens” that verify the quoting information is complete and properly formatted. Once all required fields are filled; click on the “Submit to Carrier”

button. This will rate the user's quote and bridge it into the Union Mutual QuoteWrite system, where they can work with it further.

10. After closing out of the "Real-Time Interface" program, a user will be given the opportunity to fill out an activity on their management system.

Union Standard Agents

Union Standard Insurance Group has enabled the following transactions through Applied Systems for Business Auto, Business Owners (BOP), General Liability, Commercial Property and Workers Compensation:

Quote Upload	**Billing Inquiry**
First Notice of Loss	**Policy Inquiry**
Company Web Site	**Claims Inquiry**

General Directions:

1. From within Client Activity, locate a valid Union Standard Insurance Group policy.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of transactions and select **Quote Upload**, **Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web Site.**
4. Select the policy from the list.
5. Click Finish.
6. If performing a Policy/Billing/Claims Inquiry or First Notice of Loss, then a request is sent directly to Union Standard Insurance Group via Transformation Station. After the request is processed, the response is sent back to the agent's desktop with the appropriate document.
7. If performing a Quote Upload, then a screen will pop up showing the Union Standard application page with the information from your management system pre-filled into our application. Please review the application and SUBMIT the application to Union Standard from the last page of the application.
8. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity on their Applied System.

(Updated 6/28/2011)

United Fire Group Agents

United Fire Group has enabled Policy Inquiry, Billing Inquiry, Claims Inquiry and Company Web site for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid United Fire Group policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for United Fire Group will be requested and stored. These must be entered in order to proceed. If you have questions about your United Fire Group ID or Password, please contact United Fire Group’s Agency Support Line at 800-895-6253<Phone Number>.

7. A request is sent directly to United Fire Group via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.



Utica National Personal & Commercial Lines Agents

Utica National has enabled Policy Inquiry, Billing Inquiry, Claims Inquiry and Company Web site for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Utica National policy.

2. Select “Real-time Interface” from the Options button.

3. Drop down the list of transactions and select Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Web site.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for Utica National’s @your.service site will be requested and stored. These must be entered in order to proceed. If you have questions about your Utica National ID or Password, please contact Utica National’s Help Desk at 800-289-3375.

7. A request is sent directly to Utica National via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop

8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

Wausau Commercial Lines Agents

Wausau Insurance Companies has enabled Workers Compensation, General Liability, Commercial Auto and Commercial Property quote requests for middle market commercial lines for all states, as well as, multi-state submissions, electronically via Transformation Station. File attachments may also be included in the transaction to complete the submission.

1. Your Agency Code must contain 6 digits without spaces or dashes.

2. From within Client Activity, locate a customer or prospect.

3. Under the policy detail, choose either a Workers Compensation (voluntary only), Commercial Auto, General Liability or Commercial Property application.

4. On Workers Compensation,
   - Always identify work comp class codes to specific locations.
   - Always number the various locations

5. On Workers Compensation, General Liability, Commercial Auto and Commercial Property, provide as much detail as possible throughout the applications, and in the remarks sections.

6. Select “Real-time Interface” from the Options menu (or the butterfly icon)

7. Select the line application from the list.

8. Click the Next button and select Wausau Insurance Companies from the list of carriers.

9. Click on attachments if there are documents you need to provide with the submission. Locate appropriate files and attach as needed.

10. Click the Finish or GO! button. Repeat steps 7-10 for multiple lines.

11. A request for quote is transmitted to Wausau via Transformation Station.

12. The comments tab on your results screen will reflect a successful message… Thank you for your submission…

West Bend Mutual Agents

West Bend Mutual has enabled Billing Inquiry.

1. From within Client Activity, locate a valid West Bend Mutual policy.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of valid transactions and select “Billing Inquiry”.
4. Select the Policy from the list. *Make sure that the policy is assigned to West Bend Mutual.
5. Click Finish.
6. A request for the Inquiry is sent directly to the company via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.
7. To view the response, click the "Proposal" or “Attachment” button.
8. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.



Westfield Insurance Agents

Westfield has enabled auto and home quoting via Transformation Station for their Indiana, Ohio, Pennsylvania and West Virginia agencies (package and non-standard auto included for Indiana and Ohio).

Westfield has also enabled billing, claims, and loss run inquiry, as well as company web site access for all of their agents.

1. From within Client Activity, locate a valid personal lines customer or prospect, or a valid Westfield policy.

2. Select "Real-time Interface" from the Options button.

3. Drop down the list of valid transactions and select Rate, Billing Inquiry, Claims Inquiry, Policy Inquiry, Loss Run Inquiry or Company Web Site.

4. Select the Policy from the list.

5. If Rate has been selected, click Next, then make sure that Westfield appears within the list of selected carriers.

6. Click Finish.

7. For rating, a request is sent directly to Westfield via Transformation Station. After the request is processed, the response is sent back to the agent's desktop, and a link to Westfield's online rating application is presented. Agents can click the link, then quote and issue the policy.

8. For all other transactions, a request is sent directly to Westfield's Agent's Web Passport web site via Transformation Station. Once the request is processed, you will be logged into Westfield's web site.

9. After closing out of the "Real-Time Interface" program, the agent will be given the opportunity to fill out an activity.

Wisconsin Mutual Agents

Wisconsin Mutual has enabled Website Sign-on for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Wisconsin Mutual policy.
2. Select “Real-time Interface” from the Options button.
3. Drop down the list of transactions and select Company web site.
4. Select the policy from the list.
5. Click Finish.
6. The first time a user processes an inquiry, an ID and Password for Wisconsin Mutual will be requested and stored. These must be entered in order to proceed. If you have questions about your Wisconsin Mutual ID or Password, please contact Wisconsin Mutual’s Agency Support Line at 608-836-4663.
7. A request is sent directly to Wisconsin Mutual via Transformation Station. After the request is processed, the response is sent back to the agent’s desktop
8. After closing out of the “Real-Time Interface” program, the agent will be given the opportunity to fill out an activity on their Applied System.

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About Applied Systems, Inc.

Applied Systems, Inc. develops, sells and supports insurance agency and broker management systems and provides services for accounting, customer, policy, claims management, and all related agent and broker functions. More than 130,000 users in 11,000 agencies of every size and complexity level use Applied Systems solutions built around core systems Epic, TAM, Vision and DORIS. In addition, the company leads the industry in agency-carrier real-time and batch communication solutions. Please visit us at www.appliedsystems.com**.**

More information:

If you are currently using *Transformation Station* and would like to add some of the available Carriers/Lines of business listed above, please email tsrequests@appliedsystems.com. Once your email has been sent, please wait 1-2 business days and then run the *Transformation Station Account Update*. Your requested Carriers/Lines should then be available within *Transformation Station* by simply performing an account update.

For more information concerning carriers in the process of implementing Transformation Station in the near future, please visit http://us.appliedsystems.com/downloads/Interface_Status_Report.htm

If you would like to see other Carriers/Lines of Business offered within Transformation Station, please contact your company representative and ask them to Get Lit!