Swyfft

IVANS DOWNLOAD

FREQUENTLY ASKED QUESTIONS

WHAT IS AGENCY DOWNLOAD SERVICES?

Our company has partnered with IVANS for this service. The Agency Download Service is an automated process that allows Swyfft policy information to download directly into an agency's management system.

- IVANS Download translates the data into a shareable format across multiple agency systems.
- The policy data is synchronized between Swyfft and the agency via updating the data on the agency's system.
- IVANS download streamlines the process using ACORD standards to drive agency efficiency and reduce E&O exposure. This will save time by eliminating re-keying of data as well as allowing for easier policy administration with a single workflow for your employees. The result, more time to concentrate on service and revenue generating activities.

WHAT IS DOWNLOAD?

Download may be Policy, Claims, and Direct Bill Commission Statement and/or eDocs and/or Messages. It allows the agency staff to use their agency management system to maintain data or handle documentation without having to enter it manually, ultimately reducing keystrokes required to perform the necessary service functions.

- Data
  - Policy information - include most of the information on your insurance carriers Declaration page
  - Direct Bill commission statements
  - Claims - status and information
- eDocs - supported types of documents - Images, Word Docs, Text documents, PDF's, Excel Spreadsheets
- Messages - information that may have previously been sent by email, fax or had to be retrieved on the carrier's website

## HOW DOES SWYFFT DOWNLOAD SERVICE WORK?

Each morning, Swyfft transmits new or changed policy information to IVANS. This data is sorted and placed in your agency's IVANS Mailbox. The policy data is available for download into your management system that same day.

ARE THERE ANY COSTS INVOLVED?

- Not if you are currently set up to download in your agency management system.
- Yes, if your agency has not started to benefit from download, contact your agency system for support.

DO I NEED TO HAVE AN IVANS ACCOUNT TO DOWNLOAD?

- Yes you will need to have your IVANS Y account to access Swyfft Download
- The "Y" is a unique identifier used by the carriers who download through IVANS. Once your agency places business with the Insurance carrier, the carrier downloads data or supporting information, into your agency management system. That data and information goes through the IVANS mailbox.
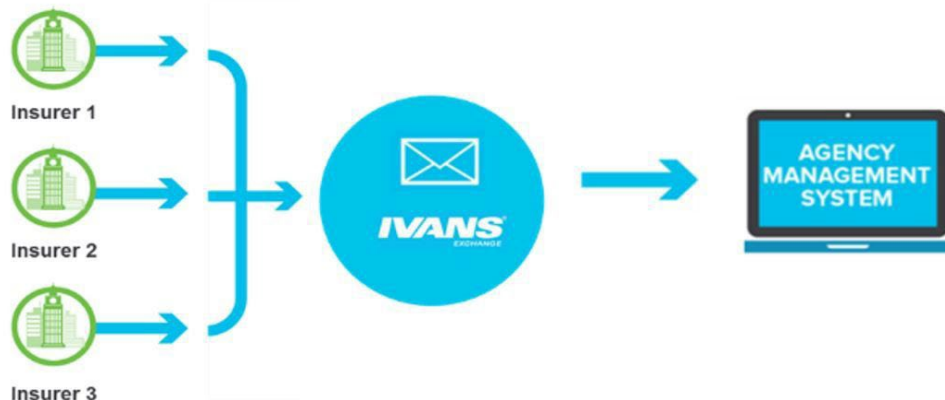
WHAT IF I DON'T HAVE AN IVANS Y ACCOUNT?

- Let us know, contact Swyfft by telephone 855-479-9338 (Personal Lines)
- We may be able to help you set up a Y account for your agency. To do this we will need to know your Agency Name; Address; Phone; Producer Code/Agent Code; Agency Management System.

DO I NEED TO DO ANYTHING WITH MY SYSTEM?

- Yes, contact your agency management system vendor to make sure your system is configured correctly to receive download with Swyfft.
- Discuss with them the lines of business you wish to download.

ARE THERE SPECIFIC AGENCY MANAGEMENT SYSTEMS THAT CAN BE USED FOR IVANS DOWNLOAD?

IVANS Transfer Manager is integrated with more than 30 agency management systems.

For a complete list of agency management systems go to **Vendor Resources Guide**

WHAT LINES OF BUSINESS/DATA ARE AVAILABLE FOR DOWNLOAD?

- Personal Lines: Home
- Coming Soon:
    - Commercial Lines: Package
    - eDocs and/or Messages
    - Claims
    - Direct Bill Commission Statements

WILL IVANS DOWNLOAD CHANGE THE WAY DOCUMENTS ARE DELIVERED TO MY CLIENTS?

IVANS Download will not impact document delivery to your clients. Insureds will continue to receive policy communication, notifications and documents as they do today.

HOW DO I CONFIGURE MY AGENCY MANAGEMENT SYSTEM TO RECEIVE IVANS DOWNLOAD?

Contact your agency management system vendor to make sure your system is configured correctly to receive IVANS Download. You will need the following information in order to configure your system to receive IVANS Download from SWYFFT:

- Line of Business: Homeowners

Swyfft IVANS Information
- Y Account: SWFT
- User ID: SWFTPRD
- Machine Address: IBM941SWYFFT
- NAIC Codes:
    - Benchmark = 41394
    - Clear Blue = 28860
    - Clear Blue Specialty = 37745
    - Lloyd's = 126004
    - Topa = 18031

- Transaction Types Supported: (All standard policy transactions)

- Company Unique Coverage Code: None

HOW OFTEN WILL IVANS DOWNLOAD FILES BE AVAILABLE IN IVANS EXCHANGE?

IVANS Download files will be available every morning.

WHY DIDN'T I RECEIVE AN IVANS DOWNLOAD FILE TODAY?

Here are a few common reasons why you may not have received an IVANS Download file:

- No activity: No transaction activity occurred within your book of business on a particular day.
- Time of day: Swyfft sends downloads every morning.
- Technical issues such as system or cycle failure, or Download service interruptions.

IF I AM HAVING TROUBLE WITH MY DOWNLOAD, WHOM DO I CALL FOR SUPPORT?

- Click the Help Button in your agency management system interface
- Contact you agency management system support
- Swyfft Support marketingteam@swyfft.com
- IVANS Connection Team: connections@ivansinsurance.com