CLAIMS DOWNLOAD FOR AGENTS

When an insured files a claim, it's an important service opportunity for the agent and carrier. It's important for you to have the most up-to-date information. Claims Download enables you to provide on-demand service customers want, populating claims data directly into your agency management system. Updated claims information is also made available in an agency's customer portal, providing customers direct information.

WHAT TRIGGERS A CLAIMS DOWNLOAD?

- opening a claim
- closing a claim
- assigning an adjuster
- changing an adjuster
- paying a claim
- setting or changing reserves
- receiving a salvage or subrogation payment

IMPORTANT TO KNOW

- It's free for agents.

- It will save you time and money. To see how much, click on this link to a calculator

- You may already have access to it. Most agency management systems offer this capability, and you just need to turn it on.

- For current information on which carriers support claims download, click here.

- If your carrier doesn't offer Claims Download, talk with them. It is easy for them to implement.

- Many carriers are increasing the frequency of downloads to several times per day, so you have most current information.

- Many carriers include adjuster notes in the download.

HOW TO GET STARTED

1. Check with your agency management system vendor.

2. Document the new process—here's where your vendor's user group can also be helpful.

3. Put someone in charge of the initiative.

4. Use the IVANS Connections report to determine which carriers offer it.

5. Check the carrier's Agent Portal or contact interface support to learn what lines of business and/or states they support.

6. Turn on Claims Download one carrier at a time and test a few transactions. Provide feedback to your carriers and agency management system vendor on what features you like or suggestions for enhancement.

7. If something is not working as you expect, look for a suitable work-around.

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