

eDocs & Messages: What Agents Should Know

eDocs & Messages allow agents to receive documents and carrier messages as part of your download directly to your agency management system. eDocs include document images such as a PDF image of a policy declaration page. Messages are simply new information from a carrier – such as message that a client has a pending cancellation for non-payment of premium – not an actual document.

IMPORTANT TO KNOW

- Free for agents.
- Do not overwrite data in your agency management system.
- Save you time and money. To see how much, [click on this link to a calculator.](#)
- Any document that is mailed, emailed, and faxed can be sent using eDocs.
- Delivered right to your agency management system—no need to login to separate carrier portals.
- Most management systems offer this capability--you just need to turn it on.
- To see which carriers support eDocs & Messages [view your IVANS connection Report.](#)
- If your carrier doesn't offer eDocs & Messages, talk with them

BENEFITS

- **Improve workflow:** automatic routing of documents to your system.
- **Save time:** Less hours spent opening mail, scanning, indexing policy documents.
- **Enhance customer service:** Respond more quickly to customer needs.
- **Reduce dependence on paper:** Eliminates manual document handling.

HOW TO GET STARTED

1. Check with your agency management system vendor.
2. Review your processes for handling documents.
3. Document how the process will change.
4. Put someone in charge of the initiative.
5. Turn on the feature in your agency management system.
6. Use the IVANS Connections report to see which carriers offer it.
7. Check the carrier's Agent Portal or contact interface support to see which transactions they support.
8. Turn on eDocs & Messages one carrier at a time.
9. Work toward implementing a paperless office.