February, 2008

Real-Time Interface Installation Guide

TAM, TAMOnline, and Vision

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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/Patches – Note: only TAM v6.3, v7.0 and v7.1 need to be Fully Patched.

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

How much does Transformation Station cost?

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

Carriers and Transactions. Check back for updates regarding new companies or new transactions.

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http://www.appliedsystems.com/PDF/RealTimeRefGuideCL.pdf

TS-R = Transformation Station Real-Time Response
TS-B = Transformation Station Bridge

● = Available for TAM® and Vision™
T = Available for TAM only
S = Scripted Transaction
* = in Pilot

Commercial Lines Transactions	Rating										Service Transactions			Other Transactions						
	Business Auto		Business Owners		General Liability		Property		Workers Comp		Billing Inquiry	Claims Inquiry	Policy Inquiry	ALERTS!	Company Website	Endorsements	First Notice of Loss	Loss Run Inquiry	Make Payment	MVR
	Rate	Issue	Rate	Issue	Rate	Issue	Rate	Issue	Rate	Issue										
Acadia Insurance Company											●-S	●-S	●-S		●-S					
Accident Fund											●		●							
ACUITY	TS-B	TS-B							TS-B		●	●	●					●		
ADR (American Driving Record)																				T*
Allied Insurance Company	TS-R		TS-R		TS-R		TS-R		TS-R		●-S	●-S	●-S		●-S					
Allstate (Independent Agents)											●	●			●-S			●		
America First (Liberty Mutual Agy Mkts)	TS-R		TS-R		TS-R		TS-R		TS-R		●	●	●	●	●-S		T	●		
Arbella Insurance Group	TS-B		TS-B						TS-B		●	●	●		●					
Association Casualty (Atlantic American Cos.)											●	●						●		
Assurant Group															●-S					
Atlantic American Companies											●	●			●			●		
Atlantic Mutual											●-S	●-S	●-S		●-S					
Auto-Owners Insurance											●	●	●		●-S	●	T	●	●	
Celina											●	●	●							
Central Insurance Companies											●	●	●		●					
Berkley Mid-Atlantic Group (Chesapeake, Firemen's Ins Co of Washington, D.C., Presque Isle, Union)									*		●-S	●-S	●-S		●-S					
Chubb											●-S	●-S	●-S		●-S		T			
Cincinnati Insurance Companies	TS-B		TS-B		TS-B		TS-B		TS-B			●			●-S					
Citizens Insurance											●	●	●			●				
CNA Insurance	TS-B		TS-B						TS-B		●-S	●-S	●-S		●-S					
Commerce Insurance Company											●	●			●-S					
Columbia Mutual											●-S	●-S			●-S					
Combined Group (MGA)	TS-B		TS-B							TS-B										
Companion Property & Casualty Group									TS-R	TS-B	●	●	●				T	●		
Continental Western Insurance Company											●-S	●-S	●-S		●-S					
Donegal Companies											●	●	●				T			
Eastern Alliance									TS-R	TS-B										
EMC											●	●	●		●					
First Insurance Company of Hawaii	TS-R	TS-R							TS-R	TS-R										
Frankenmuth Mutual	TS-B		TS-B						TS-B		●	●	●		●	●	T		●	
Fremont Mutual											●	●	●		●		T		●	
General Casualty											●-S	●-S	●-S							
Georgia Casualty (Atlantic American Cos.)											●	●			●-S			●		
Germantown Mutual											●		●							
Golden Eagle (Liberty Mutual Agy Mkts)											●	●	●	●	●-S		T	●		
Grange Mutual	TS-B										●	●	●		●				●	
Great West Casualty											●	●	●					●		
Hanover Insurance Group											●	●	●			●				
Harleysville Insurance Group											●-S	●-S	●-S		●-S					

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Commercial Lines Transactions

	Rating										Service Transactions			Other Transactions						
	Business Auto		Business Owners		General Liability		Property		Workers Comp		Billing Inquiry	Claims Inquiry	Policy Inquiry	ALERTS!	Company Website	Endorsements	First Notice of Loss	Loss Run Inquiry	Make Payment	MVR
	Rate	Issue	Rate	Issue	Rate	Issue	Rate	Issue	Rate	Issue										
Hartford Insurance Group	TS-B		TS-B						TS-B		•	•	•		•		T	•		
Hastings Mutual											•	•	•						•	
Hawaii Employers Mutual Insurance Co.									TS-R	TS-R										
Hawkeye Security (Liberty Mutual Agy Mkts)	TS-R		TS-R		*		*		TS-R		•	•	•	T*	•-S		T	•		
Indiana Insurance (Liberty Mutual Agy Mkts)	TS-R		TS-R		*		*		TS-R		•	•	•	•	•-S		T	•		
Integrity Mutual	TS-B										•	•	•		•				•	
Liberty Mutual Agency Markets	TS-R		TS-R		TS-R		TS-R		TS-R		•	•	•	•	•-S		T	•		
Louisiana Workers' Compensation Corp									TS-R											
(The) Main Street America Group	TS-R		TS-R								•	•								
Maine Employers Mutual											•-S	•-S	•-S		•-S					
MetLife Auto and Home											•	•	•							
Michigan Insurance Company											•	•	•							
Missouri Employers Mutual									TS-R	TS-B										
Montgomery Insurance (Liberty Mutual Agy	TS-R		TS-R		TS-R		TS-R		TS-R		•	•	•	•	•-S		T	•		
Motorists Mutual Insurance Company											•	•								
Mutual Benefit Group											•-S	•-S								
New London County Mutual											•	•	•			•				
New York Central Mutual											•		•-S		•					
Ohio Casualty Group			TS-B								•	•	•		•-S		T	•		
OneBeacon Insurance Group											•-S	•-S	•-S		•-S					
Peerless Insurance (Liberty Mutual Agy Mkts)	TS-R		TS-R		*		*		TS-R		•	•	•	•	•-S		T	•		
Pekin											•-S	•-S	•-S		•-S					
Penn National Insurance											•	•	•		•					
Progressive Drive Insurance											•	•	•							
Safeco			TS-B	TS-B							•-S	•-S			•-S					
Safelite Solutions																	T			
Secura											•-S	•-S	•-S		•-S					
Selective	TS-R		TS-R		TS-R				TS-R		•-S	•-S	•-S		•-S		T			
Service Lloyds									TS-B						•					
Society Insurance											•-S	•-S	•-S		•-S					
State Auto											•	•	•				T		•	
State Fund Mutual Companies											•	•	•		•			•		
Summit									TS-B											
Texas Mutual									TS-B											
Tower Insurance Company of NY													•							
Travelers											•	•	•					•		
Unigard (QBE Insurance Group)											•	•	T				T	•		
Union Standard Insurance Company											•-S	•-S	•-S		•-S					
United Fire Group											•	•	•		•					
Utica National Insurance Group											•-S	•-S			•-S					
Vermont Mutual											•-S	•-S	•-S		•-S					
Wausau (Liberty Mutual)	TS-B				TS-B		TS-B		TS-B											
West Bend Mutual											•	•	•		•			•		
Westfield Insurance											•	•			•			•		
Wisconsin Mutual Insurance															•-S					
Zurich Insurance Company											•	•	*					•		

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Personal Lines Transactions

	Rating										Service Transactions									
	Automobile		Dwelling Fire		Homeowners		Umbrella		Package		Billing Inquiry	Claims Inquiry	Policy Inquiry	ALERTS!	Company Website	Endorsements	First Notice of Loss	Loss Run Inquiry	Make Payment	MVR
	Rate	Issue	Rate	Issue	Rate	Issue	Rate	Issue	Rate	Issue										
ACUITY	TS-B	TS-B			TS-B	TS-B			TS-B	TS-B	•	•	•			•		•		
Adirondack Insurance (OneBeacon Ins Grp)											•-S	•-S	•-S		•-S	•				
ADR (American Driving Record)																				T
AIG Private Client Group	TS-B				TS-B		TS-B										T			
Allied Insurance Company											•-S	•-S	•-S		•-S					
Allstate (Independent Agents)	TS-R										•	•			•-S			•		
America First (Liberty Mutual Agy Mkts)	TS-R				TS-R		TS-R		TS-R		•	•	•	•	•-S		T	•		
Arbella Insurance Group	TS-B		TS-B		TS-B		TS-B				•	•	•		•					
Assurant Group															•					
Atlantic American Companies																				
Atlantic Mutual											•-S	•-S	•-S		•-S					
Auto Club Group/AAA - Michigan	TS-B				TS-B						•									
Auto Club of Southern California	TS-R				TS-R															
Auto-Owners Insurance	TS-B										•	•	•		•-S	•	T	•	•	
Celina											•	•	•							
Central Insurance Companies	TS-B		TS-B		TS-B		TS-B				•	•	•		•	•				
Chubb											•-S	•-S	•-S		•-S	•	T			
Cincinnati Insurance Companies												•			•-S					
Citizens Insurance											•	•	•			•				
Colorado Casualty (Liberty Mutual Agy Mkts)	TS-R				TS-R		TS-R		TS-R		•	•		•	•-S		T	•		
Columbia Mutual											•-S	•-S			•-S					
Commerce Insurance Company											•-S	•-S			•-S					
Companion Property & Casualty Group											•	•	•				T	•		
Co-Operative Insurance Company	TS-B																			
Deerbrook (Florida ONLY)	TS-B																			
Donegal Companies	TS-B	TS-B			TS-B	TS-B					•	•	•				T			
EMC	TS-B				TS-B						•	•	•		•					
Encompass	TS-B	TS-B			TS-B					TS-B	•	•	•	T*	•	•-S		•		
Farmers Mutual of Nebraska											•	•-S	•-S		•-S					
Farmers Insurance Group	TS-B				TS-B															
Fireman's Fund											•			T						
Foremost	TS-B				TS-B										•-S					
Frankenmuth Mutual	TS-B				TS-B						•	•	•		•	•	T		•	
Fremont Mutual	TS-B				TS-B						•	•	•		•		T	•	•	
General Casualty											•-S	•-S	•-S							
Germantown Mutual											•		•							
Grange Mutual	TS-B		TS-B		TS-R						•	•	•		•	•	T		•	
Grange Trustguard Family	TS-B																			
Grinnell Mutual Reinsurance	TS-B										•	•	•					•		
Hanover Insurance Group											•	•	•			•				
Harleysville Insurance Group											•-S	•-S	•-S		•-S					
Hartford Insurance Group	TS-B				TS-B						•	•	•		•					
Hastings Mutual	TS-B				TS-B						•	•	•		•				•	

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	Rate	Issue	Rate	Issue	Rate	Issue	Rate	Issue	Rate	Issue										
Hawkeye Security (Liberty Mutual Agy Mkts)	TS-R				TS-R		TS-R		TS-R		•	•		T*	•-S		T			
IMT Insurance Group											•		•		•					
Indiana Farmers Mutual											•	•	•							
Indiana Insurance (Liberty Mutual Agy Mkts)	TS-R				TS-R		TS-R		TS-R		•	•	•	•	•-S		T	•		
Integrity Mutual	TS-R		TS-B		TS-R						•	•	•		•	•	T		•	
Kemper Auto and Home												•	•			•				
Kemper Insurance Company											•					•				
LeMars (Donegal Companies)	TS-B				TS-B															
Liberty Mutual Agency Markets	TS-R				TS-R		TS-R				•	•	•	•	•-S		T	•		
(The) Main Street America Group	TS-R				TS-R						•	•								
Mercury Insurance											•-S	•-S	•-S		•-S					
MetLife Auto and Home											•	•	•			•				
Michigan Insurance Company											•	•	•							
MMG Insurance	TS-B										T									
Montgomery Insurance (Liberty Mutual Agy Mkts)	TS-R				TS-R		TS-R		TS-R		•	•	•	•	•-S		T	•		
Motorists Mutual Insurance Company											•	•								
Mutual Benefit Group											•-S	•-S			•-S					
National Grange (Main Street America)					TS-R															
New London County Mutual											•	•	•			•				
New York Central Mutual											•		•-S		•					
Ohio Casualty Group	TS-R	TS-R			TS-R	TS-R					•	•	•		•-S		T	•		
Old Dominion (Main Street America)	TS-R																			
OneBeacon Insurance Group											•-S	•-S	•-S		•-S	•				
Peerless Insurance (Liberty Mutual Agy Mkts)	TS-R				TS-R		TS-R		TS-R		•	•	•	•	•-S		T	•		
Pekin											•-S	•-S	•-S		•-S					
Penn National Insurance	TS-R				TS-R						•	•	•		•					
Pioneer State Mutual															•-S					
Preferred Mutual Insurance	TS-B				TS-B				TS-B		•-S		•-S		•-S	•-S		•	•	
Progressive Drive Insurance	TS-B	TS-B									•	•	•						•	
Safeco	TS-B	TS-B			TS-B	TS-B					•-S	•-S	•-S		•-S					
Safelite Solutions																	T			
Secura											•-S	•-S	•-S		•-S					
Selective	TS-R	TS-B			TS-R	TS-B					•-S	•-S			•-S		T			
Southern Ins Co of Viriginia (Donegal Cos)	TS-B				TS-B															
State Auto Insurance Company	TS-B				TS-B				TS-B		•	•	•			•	T		•	
State Fund Mutual Companies											•	•	•					•		
Tower Insurance Company of NY					TS-B								•							
Travelers	TS-B	TS-B									•	•	•							
Trustgard	TS-R		TS-B		TS-R						•	•	•		•	•			•	
Unigard (QBE Insurance Group)		TS-R									•	•	T				T	•		
United Fire Group											•	•	•		•					
Utica National Insurance Group											•-S	•-S	•-S		•-S					
Vermont Mutual											•-S	•-S	•-S		•-S					
West Bend Mutual	TS-B				TS-B				TS-B		•	•	•		•			•		
Western Reserve Group											•	•	•							
Westfield Insurance	TS-B				TS-B				TS-B		•	•	•		•	•		•		
Wisconsin Mutual Insurance															•-S					

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:

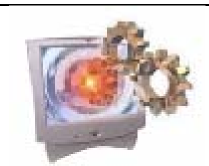
http://www.adobe.com/products/acrobat/readstep2.html

Vision v2.3 Agents

1. Vision v2.3 - Install ALL patches.

2. Call Vision Support to setup your management system.

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



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

****
QUESTIONS - Please refer to the Help System available from within Real-time Interface.
****

1. Install ALL patches for TAM v6.3, v7.0 and v7.1.

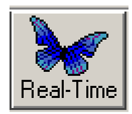
2. Make sure that you or your agency has a connection to the Internet. One way to tell is to type in the following URL into your browser:

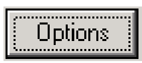
https://chicago2.warpcentral.com

The page with the wording "This is Lisle and the magic color is Purple**" should appear.**

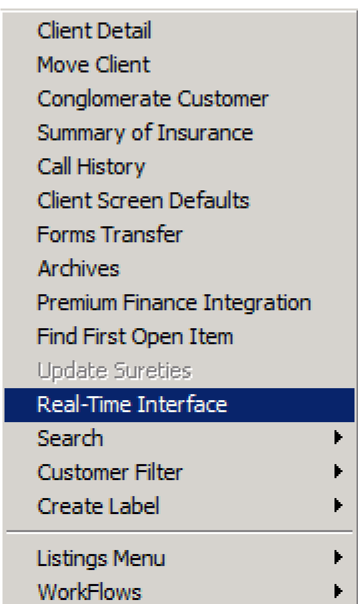
If the page does not appear or an error is presented then either a connection is NOT made to the Internet or your network will not allow access to this website. Please contact your System Administrator to correct the problem before continuing.

3. 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.

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

or click on the Options Button 

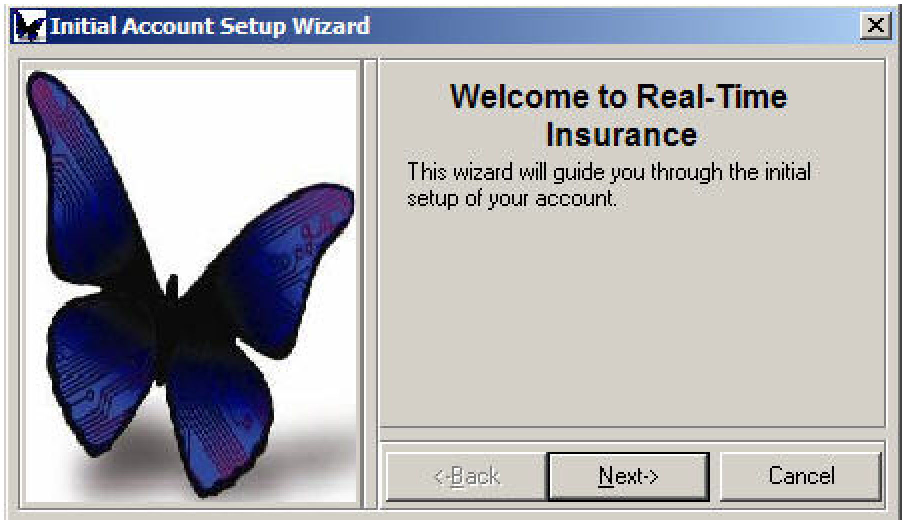
and select "Real-Time Interface".



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

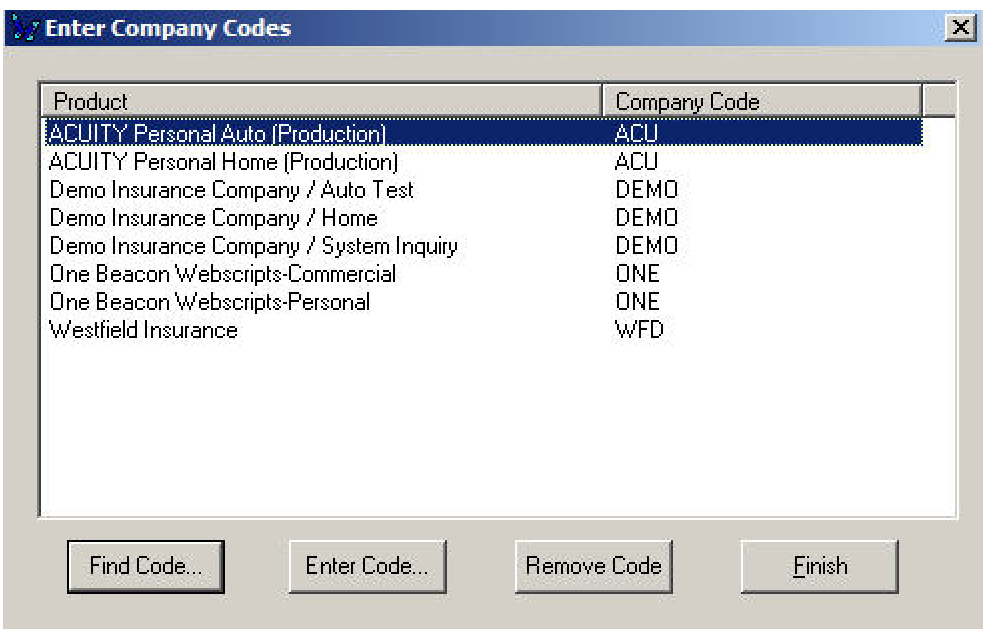
6. <u>1st TIME ONLY</u> – The Initial Account Setup wizard with run after clicking on the butterfly to automatically configure your Transformation Station account.

First screen of the Setup Wizard. Click Next.



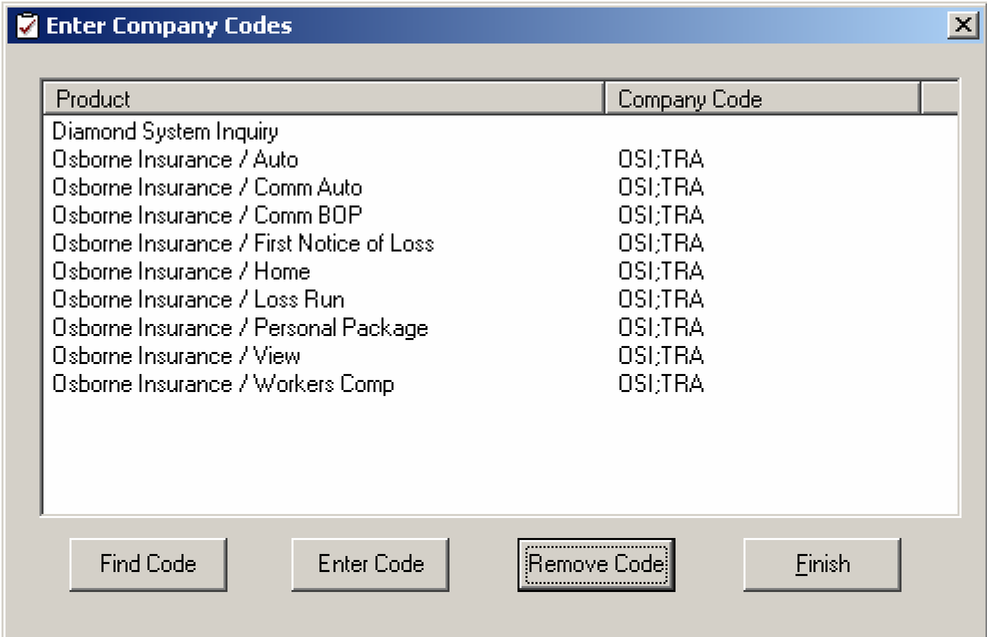
As the Initial Account Setup is run, you will see the Real Time Connect dialog box appear in the bottom right hand corner of your screen. The messages displayed will update you on the progress of your configuration.

7. 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.

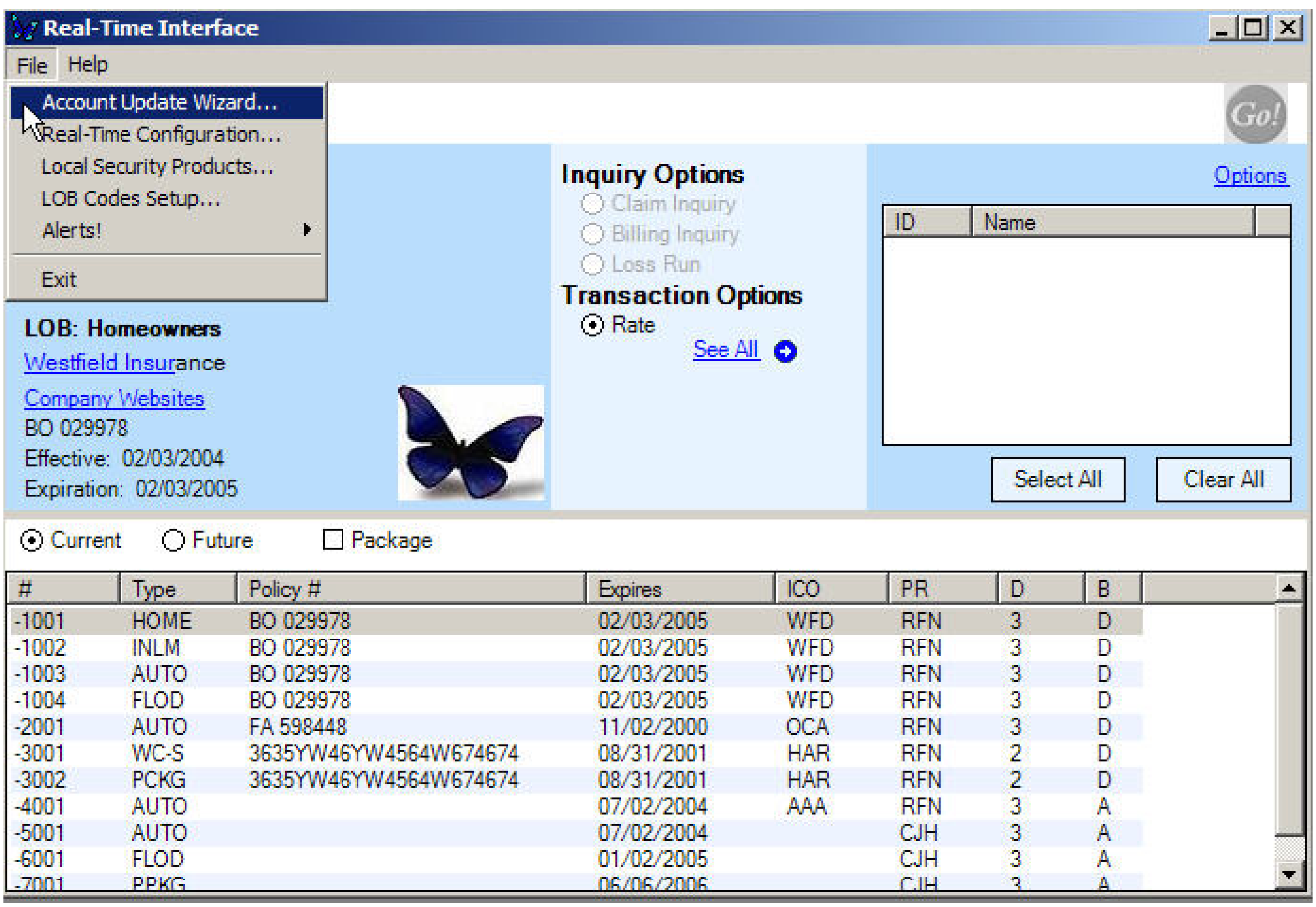


- Find Code allows the user to select the company codes from TAM's Company Lookup dialog box.
- Enter code allows the user to type in the TAM Company Code.
- Remove Code sets the product's company code to a blank.
- By holding the Shift or Ctrl key, you can select multiple products to enter the same company code.

You can enter more than one company code per product by separating the Company Code with a ";".



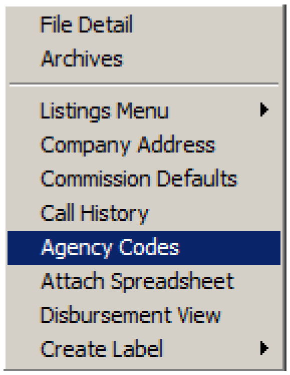
8. <u>ACCOUNT UPDATE</u> – As new products are added to your account, it will be necessary for you to perform an account update to configure these new products on your system. From within the Real Time Interface, click File, Account Update Wizard



9. 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.

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

11. TAM - 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.



12. VISION – Please refer to your help system for assistance in setting up agency codes & contract #s.

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

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Carrier Guides

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ACUITY **Personal & Commercial 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".

FIRST Advantage ADR

Instructions for ordering Real-Time Motor Vehicle Records

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

2. Select "Real-Time Interface" from the Options button or click the Real-Time blue butterfly.

3. Select "Order MVR"

4. Select the applicable policy from the list.

5. Select the applicable driver(s).

6. Click Finish.

7. The first time a user attempts a transaction, they will be prompted to input their ID and Password. The ID and Password must be obtained from First Advantage, ADR. If you require assistance with the ID and Password, please contact First Advantage, ADR at 1-800-766-6877 ext 2.

8. A request for the transaction is sent directly to First Advantage, ADR via Transformation Station. After the request is processed, the response including the MVR(s) 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.

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.

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.

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

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.

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.

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 Website.

4. Click Finish.

5. The first time a user processes a Company Website 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.

Atlantic Mutual Agents

Atlantic Mutual has enabled Policy Inquiry, Billing Inquiry, Claims Inquiry and Company Website for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Atlantic 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 Website.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for Atlantic Mutual will be requested and stored. These must be entered in order to proceed. If you have questions about your Atlantic Mutual ID or Password, please contact Atlantic Mutual’s Agency Support Line at 800-666-6116, Option 1<Pho.

7. A request is sent directly to Atlantic 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.

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.

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.
9. 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.
10. A browser will be launched at the desktop and the user will be placed within Celina's website to complete their inquiry.
11. 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 Company Website, Billing, Claims and Policy inquiry for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Central 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 Website.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, 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.

7. 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

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.

Chubb Personal Lines Agents

Chubb has enabled Billing, Claims, Policy Inquiry, and Company Website 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 Website.

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 Website 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 Website.

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

CNA Insurance has enabled Billing, Claims and Policy inquiry and Company Website access for their agents.

1. From within Client Activity, locate a valid CNA 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 Website.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for CNA Central will be requested and stored. These 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 Central via Transformation Station. Once the request is processed, you will be logged into CNA Central.

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.

Columbia Insurance Group has enabled Billing Inquiry, Claims Inquiry, and Company Website 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 Website.
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 has enabled Billing Inquiry and Claims Inquiry for all agents writing Personal Lines and Commercial Lines business. Company Website 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 Website.

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.

Drive Insurance from 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 Drive Insurance from 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.

Electric Insurance Agents

Electric Insurance has enabled Personal Auto Quoting for their agents.

1. Prior to running the real-time transaction for the first time, make sure that you've loaded Electric's latest Uniques and Edits. If you have any questions, please contact their help desk @ **978-524-5649.**

2. STOP - Has #1 been completed? If it has not, you will be unable to use Transformation Station for Electric's real-time quoting.

3. From within Client Activity, locate a client that has a valid personal auto policy.

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

5. Drop down the list of transactions and select Rate.

6. Select the policy from the list.

7. Click Next.

8. Make sure that Electric appears within the list of selected carriers.

9. Click Finish.

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

11. A full-term premium is presented to the agent. If the premium is acceptable, click the "Accept" button to have the quote written back to TAM's database.

12. 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 has enabled Policy, Billing, and Claim Inquiry for their Personal and Commercial lines agents.

They have also enabled Personal lines Auto quoting.

1. From within Client Activity, locate a valid EMC policy.
2. Select "Real-time Interface" from the Options button.
3. Drop down the list of transactions and select Policy, Billing, Claim Inquiry, or Rate.
4. Select the policy from the list. *Make sure that the policy is assigned to EMC.
5. For Inquiry transactions, Click Finish.
6. For Quoting, Click Next.
7. Make sure that EMC appears within the list of selected carriers.
8. The first time a user processes an inquiry or a rate, an EMC 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 EMC User-Id or Password, please contact the EMC Internet and Agency Help Desk at 1.877.249.0581, or via e-mail at Agency.Internet.Help@EMCIns.com.
9. A request for the Inquiry or Quote is sent directly to EMC via Transformation Station. After the Inquiry request is processed, a browser will open and the inquiry will be displayed. You may continue to navigate the EMC website for additional information. After the Quote request is processed, the response is sent back to the agent's desktop.
10. After closing the browser, the agent will be given the opportunity to fill out an activity detail screen on their Applied System.

Encompass Insurance Personal Lines Agents

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

First Insurance Company Of Hawaii (FICOH) Agents

First Insurance Company Of Hawaii (FICOH) has enabled Personal Auto, Workers Comp, and Commercial Auto Quoting and Issuance for their agents. They have also enabled all of their agents for Billing and Policy Inquiry.

1. Prior to running the real-time transaction for the first time, make sure that you've loaded FICOH's latest Uniques and Edits. If you have any questions, please contact their help desk @ 808-527-7767.

2. STOP - Has #1 been completed? If it has not, you will be unable to use Transformation Station for FICOH's Auto and Workers Comp real-time quoting/issuing.

3. From within Client Activity, locate a client that has either a valid personal auto, workers comp, or commercial auto policy.

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

5. Drop down the list of valid transactions and select "Rate", "Billing Inquiry", or "Policy Inquiry".

6. Select the Policy from the list.

7. Click Next.

8. Make sure that FICOH appears within the list of selected carriers.

9. Click Finish.

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

11. If quoting, a full-term premium is presented to the agent. To view a company formatted response, use the hyper link labeled: "Click to view your First Insurance Company of Hawaii Quote Proposal."

12. If the premium is acceptable, the policy can be Issued by clicking the "Issue" button. Once the transaction is successful any changed data (i.e. Policy #) will be written back to TAM's database.

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

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 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.

Grange Mutual 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 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 has enabled all their agents to access Billing Inquiry, Claims Inquiry and Policy Inquiry for both Personal and Commercial lines.

Hartford has also enabled Loss Run Inquiry and Auto and Property 1st Notice of Loss submissions for their Commercial Lines Agents.

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

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

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

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

5. Click Finish.

6. The first time a user processes a transaction, an EBC ID and Password for The Hartford will be requested and stored. These must be entered in order to proceed. If you have questions about your Hartford EBC ID or Password, please contact the AIS Help Desk at 1-877-322-4833.

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

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.

Kemper Auto and Home Personal Lines Agents

Kemper Auto and Home has enabled Auto, Home and Package Quoting for personal lines.

1. Prior to running the real-time transaction for the first time, contact Kemper Auto and Home's Marketing Specialist Department @ 1-866-786-4434, to establish an account and to receive further instructions.

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

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

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

5. Drop down the list of valid transactions and select "Rate".

6. Select the Policy from the list.

7. Click Next.

8. Make sure that Kemper appears within the list of selected carriers.

9. Click Finish.

10. A request for the Quote is sent directly to Kemper Auto and Home via Transformation Station. After the request is processed, the response is sent back to the agent's desktop.

11. A full term premium is presented to the agent. If the premium is acceptable, click the "Accept" button to have the quote written back to TAM's database.

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

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.

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 Website 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 Website.

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.

Mercury Insurance Group has enabled Billing Inquiry, Claims Inquiry, Policy Inquiry for Personal Lines.

1. From within Client Activity, locate a valid Mercury Insurance Group 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.

4. Select the policy from the list.

5. Click Go.

6. The first time a user processes an inquiry, an ID and Password for Mercury Insurance Group will be requested and stored. These must be entered in order to proceed. If you have questions about your Mercury Insurance Group ID or Password, please contact Mercury Insurance Group's Agency Support Line at (888) 637-2175.

7. A request is sent directly to Mercury Insurance 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.

Mercury Insurance Group has enabled Billing Inquiry, Claims Inquiry, Policy Inquiry for Personal Lines.

1. From within Client Activity, locate a valid Mercury Insurance Group 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.
4. Select the policy from the list.
5. Click Go.
6. The first time a user processes an inquiry, an ID and Password for Mercury Insurance Group will be requested and stored. These must be entered in order to proceed. If you have questions about your Mercury Insurance Group ID or Password, please contact Mercury Insurance Group's Agency Support Line at (888) 637-2175.
7. A request is sent directly to Mercury Insurance 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.

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 has enabled Company Website 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 Website.

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 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 Website 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 Website”.

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.

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 Website 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 Website.

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.

Preferred Mutual Insurance Agents

Preferred Mutual has enabled Billing, Claims and Policy Inquiry, Company Website 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 Website 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.

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

Safelite Solutions has made First Notice of Loss submission available specifically for Glass claims.

Once configured, when an account update is run, Safelite Solutions will appear in the list of available products. Please add the company code to the product for each of the carriers for which you would like to submit glass claims to Safelite Solutions.

Please ensure a NAIC code is set up in the TAM system for each of the company codes entered above.

1. Complete the First Notice of Loss.

2. From the Customer or Policy List screen, select First Notice of Loss.

3. Select the appropriate claim and click Next.

4. Select the desired First Notice of Loss, **Check the Glass** checkbox, select the Safelite Solutions product with the proper corresponding company code, and Click Next.

5. A WebEdit screen will appear where the Glass deductible is confirmed. Enter the proper Glass deductible and Click Process.

6. The transaction will initiate and send the First Notice of Loss to Safelite Solutions.

7. Safelite Solutions will respond with a claim number.

SECURA Insurance Agents

SECURA Insurance has enabled Company Website, 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 Website.

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 Website.

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 Website, 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 Website.

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 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 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.

***Travelers also has the ability to do real-time transactions for BOP, Work Comp and Business Auto quoting. Please contact your Travelers Automation Specialists if you are interested in signing up for these transactions.

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. If you’re experiencing problems with Traveler’s “Policy Inquiry” transaction and are using IE6, please follow the instructions laid out within the following PDF file:

14. http://www.appliedsystems.com/transformation/documents/trustedsite60.pdf

15. 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 has Enabled the following transactions:

- **Billing Inquiry**
- **Claims Inquiry**
- **Loss Runs**
- **1st Notice of Loss**

1. For those agents who are not 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@unigard.com.

   For those agents who are currently using Transformation Station with Unigard, but may not have all of the above transactions showing as available, just run the Account Update and you are ready to go!

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.

Union Standard
A BERKLEY COMPANY

Union Standard Agents

Policies writing through:
Acadia Insurance Company
Continental Western Insurance Company
Union Insurance Company
Union Standard Lloyds

Union Standard Insurance Group has enabled Billing Inquiry, Claims Inquiry, Policy Inquiry and Company Website for Commercial Lines.

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 Billing Inquiry, Claims Inquiry, Policy Inquiry or Company Website.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for Union Standard Insurance Group will be requested and stored. These must be entered in order to proceed. If you have questions about your Union Standard Insurance Group ID or Password, please contact Union Standard Insurance Group's Agency Support Line at 800-432-4908.

7. 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

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.

United Fire Group Agents

United Fire Group has enabled Policy Inquiry, Billing Inquiry, Claims Inquiry and Company Website 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 Website.

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 Website 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 Website.
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.

Vermont Mutual Agents

Vermont Mutual has enabled Company Website, Billing, Claims and Policy inquiry for Personal Lines and Commercial Lines.

1. From within Client Activity, locate a valid Vermont 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 Website.

4. Select the policy from the list.

5. Click Finish.

6. The first time a user processes an inquiry, an ID and Password for Vermont Mutual will be requested and stored. These must be entered in order to proceed. If you have questions about your Vermont Mutual ID or Password, please contact the Vermont Mutual Help Desk at 1-800-451-5000 ext 7100.

7. A request is sent directly to Vermont 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.

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 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 Website.

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.

Trademarks

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About Applied Systems, Inc.

Applied Systems is the leading provider of automation solutions for the property and casualty insurance industry. Since 1983, the company has developed software for independent insurance agents, brokers, managing general agents, and insurance companies, as well as banks and other financial institutions with insurance operations. Applied has helped more than 10,000 clients achieve new levels of success using its leading management systems, The Agency Manager® and The Agency Manager® Vision Series™. Other innovations such as The Diamond System™, a policy processing system for insurance carriers, and developments in electronic data interchange also have contributed to Applied Systems' position as the industry's technology frontrunner. Combined with its consulting services, rating solutions, and third-party integration, Applied Systems automates insurance transactions at every level of distribution, from customer to carrier.

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 doing an account update.

For more information concerning carriers in the process of implementing Transformation Station in the near future, please visit http://www.appliedsystems.com/transformation/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!