

# Streamline Your Workflows

With ACORD® eDocs and Messages

FOR AGENTS AND BROKERS



## Work Smarter With ACORD eDocs:

- Reduce errors and omissions (E&O)
- Increase data security
- Receive and distribute policy information faster
- Reduce paperwork, shredding, and storage

Save costs, improve efficiency, and increase security with ACORD eDocs and messages from Liberty Mutual Insurance.

Agents and brokers everywhere are enjoying the benefits of ACORD eDocs and messages, a system that delivers electronic copies of policies, certain billing notices, and claims updates to your agency management system. Receiving this information as part of your daily download means you can access all your important information without having to log into a separate system. ACORD eDocs and messages save you money, help you accomplish more in less time, and even make your client communications more secure.

### **ACORD eDocs and Messages Save You Valuable Time and Effort** Sends information promptly.

Don't wait around for paper output. You'll receive ACORD eDocs and messages the morning following the activity and before your policyholder receives a paper notice in the mail.

### Automatically sends daily PDF attachments identical to inquiry views.

With ACORD eDocs and messages, the latest updates are already in your agency management system, so you don't have to perform policy, claims, or billing inquiries.

### Supports paperless office initiatives.

Receive agent or insured copies of policies as attachments, so you don't have to scan and index paper output.<sup>1</sup>

### Seamlessly integrates with daily download workflow.

No need to change your current workflow; batch ACORD messages are sent to your IVANS® mailbox and retrieved along with your daily download.

### Automatically creates and assigns an activity or reminder to the person who services that client.<sup>2</sup>

Eliminates emails and attachments that require manual setting and/or assignment of activities.

### **ACORD eDocs and Messages are available for all commercial lines of business:**

- Business auto
- Business owner's policy (BOP)
- Comprehensive Business Package (CBP)
- Crime<sup>3</sup>
- Custom Protector® (CPSP)
- General liability
- Inland marine<sup>3</sup>
- Property
- Umbrella
- Workers compensation

### Liberty Mutual supports messages with PDF attachments for:

- Billing (pending cancellations and reinstatements)
- Claims (opened, paid, closed, and re-opened)
- Policies (new business, renewal, and endorsement)

1. Based on your print preferences setup within the Agents' Portal. Preferences can be updated on the Agents' Portal.

2. Applicable to implementation with Applied Systems and NASA Eclipse.

3. As coverage on package policy download.

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## Compatible Systems

ACORD eDocs and messages work with these agency management systems:

- Applied Systems' TAM® (10.3+) and Epic™ (6.0+)
- HawkSoft's® CMS (3.14+)
- NASA Eclipse (6.1+)
- Vertafore, Inc.'s TransactNOW® (6.0+) client-installed with AMS360®, AfW®, Sagitta®, Prime, and Instar agency management systems

## Start Saving Time Today With ACORD eDocs and Messages!

Work with your Agency Administrator to get set up.

### How to Register:

1. Log in to the Agents' Portal at [commercialportal.libertymutual.com](http://commercialportal.libertymutual.com)
2. Go to the Agency Administration tab
3. Within the Real Time & Download section, click on **Download — Registration and Resend Request**

You will need the following information:

- Agency code
  - Agency management system name and version number
  - IVANS account and user IDs
  - IBM #
4. Scroll to the bottom of the page and choose which ACORD eDocs you'd like to receive (policy, claims, and billing)

To set up your agency management system, please contact your vendor for specific instructions.

If you have any questions, please contact our Agency Interface Support Group by email: [agencyinterfacesupportgroup@libertymutual.com](mailto:agencyinterfacesupportgroup@libertymutual.com) or by phone: 888-451-8414.