Back to Basics
Interface 101
for TAM

801 Douglas Avenue #205
Altamonte Springs, FL  32714
Phone:  407-869-0404  Fax:  407-869-0418
Back to Basics Interface 101-TAM

Objective: All of the basic information necessary to use the Interface capabilities in TAM.

Assumptions: This seminar is based on the following
TAM Version 9.0.0
Microsoft ® Word Version 2003

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Terms

ACORD – Association for Cooperative Operations Research and Development
- Set Form and Electronic Standards for the Insurance Industry

Batch Interface
- An interface session in which many transactions are sent and processed

Comm-Press
- Data compression routines Batch Interface.
- These routines reduce the size of files being transmitted which ultimately reduces the cost of interface

Communication Log
- A report listing all transactions sent and received and their status
- Also lists any files that may have contained errors and could not be processed

ECS – Electronic Commerce Server
- An IVANS Network used for Batch Interface

Interface
- Electronic communication between an agency and their carriers or other service providers

IVANS – Insurance Value Added Network Services
- Provides agencies and carriers access to the ECS, AT&T Global Network and Transformation Station

Machineable - (a.k.a. AL3)
- An ACORD standard industry data format

NAIC - National Association of Insurance Commissioners
- NAIC assigns a number to every Insurance Carrier in the U.S.
- The NAIC Code is used to determine which company you are receiving a download from

Print Image - (a.k.a. AL1)
- An ACORD standard industry data format

SEMCI - Single Entry Multi Company Interface
- Entering data once and being able to reuse it
- Communicate that data to many companies
- Use the same data for multiple transaction within one company

Suspense File
- A temporary storage location for downloaded policies that did not match customers or policies already in the system

Transaction
- Throughout this class the term Transaction refers to one policy within an electronic ACORD standard message.
- This is not related to accounting transactions

Transformation Station (a.k.a. TS) or Real Time Interface
- An IVANS Internet real-time data exchange used by a number of carriers
- Available to agents with Applied.
- Provides "seamless" capabilities for:
  - Alerts!
  - Billing Inquiry
  - Claims Inquiry
  - Policy View
  - Loss Runs Inquiry
  - Endorsement Bridge
  - First Notice of Loss
  - Quote
  - Issue a Policy
  - Commercial Schedule Submissions
  - Web Site Access
**Interface Setup Options**

- Before beginning any interface there are items that must be setup in the Agency File and Company File
- Communications Support will Assist you in completing this setup

**Connection Options**

**Batch Interface**
- Connect via the Internet with Transfer Manager
- Dial Up via Modem for I.E. (Information Exchange)
- Note: With the current release you will no longer have to dial-up to receive batch interface from I.E. Everything will go through your Internet Connection

**Real-Time Transformation Station**
- Connect via the Internet

**Setup**
- Communications Support will help you set up the connectivity for the type of interface you are doing

**Interface Utilities**

**Night Utilities**
- You can run daily upload and download by setting up via night utilities
- ALERTS™ can also be set up to run automatically via night utilities

Select **Utilities, System Administrative, Night Setup**
Click **Night Setup**
Click **IVANS Transmission**
Click **Real-Time Alerts**
Click **OK**
You will be asked “Do You Wish To Save Parameters”, Click **Yes**
(Repeat the above for each day of the week)

**Download Utilities**
- Communication Log Setup-can select different options to print
- Reprint Communication Log
- Print Forms Received-AL1 format, generally just sent from Progressive.

**Communication Log Set Up**
Select **Utilities, Company Interface, Miscellaneous Download Utilities, Communication Log Setup**
- Sort Options
  - Customer or Transaction Sequence Number
- Miscellaneous Options
  - Page Break by Company
  - Send Communications Log to Spreadsheet
    - Select Path to save to X:Tam\Sav

**Reprint Communication Log**
Select **Utilities, Company Interface, Miscellaneous Download Utilities**

- Reprints all items on the Communication Log since the last Pack & Reindex was run
Print Forms Received
Select Utilities, Company Interface, Print Forms Received
Select Items to Print or Select All then click Continue
- Prints messages received from carriers that were sent in AL1 format
- Communication Log Entries of “Forms Received”
- The goal is to replace these eventually with Alerts!

Agency File Setup
Batch Interface
Select Utilities, Company Interface, Agency File Interface Setup, Batch Interface Tab
IVANS Information
- Account Number
- User ID
- Password
- Phone Numbers
- Origination Address
  - Install for all agencies

Company File Setup
Interface 101
- Everything that you do on the Company setup has to be done for EVERY Company that you interface with
- Every company means each Issuing/Writing Company
Example:
- ABC is the Billing Company
- ABC has several Issuing Companies, each of those needs to have the Setup done
Key Data for Interface

- **NAIC Code**
  - Used to Determine the Company Code associated with Upload and Download
- **Contract Number**
  - Identifies the Agency to the Carrier on Upload
  - Determines the Agency/Branch for Download

**Procedures**

Select **Clients & Files, Companies**
- Billing Companies
- Issuing Companies

Select **Options, Agency Codes**
**Download and Initial Load Setup**

- Before any Interface takes place, additional information must be setup in the Company file

**Company File – Download Setup**
Select **Utilities, Company Interface, Company File Interface Setup,**

**Download Tab**
- Origination Address
- Personal & Commercial Lines Tabs
  - Enter the Default Policy Type for Each Line of Business
  - Check **Update Company Unique** if you wish Company Unique Screens to be updated during download
    - Not all companies support this option

**Commercial Lines Tab**
Check **Create AP Billing Screen if:**
- A billing screen should be created associated with the Commercial Applicant Information Section for the line of business downloaded

Check **Update AP Premium if:**
- The premium should be updated on the billing screen associated with the Commercial Applicant Information Section
Download Options

- Create Policies on New Business
  - If the customer exists, but the policy does not, the download will create a new policy
  - Only available if company sends customer code
- Update Premiums
- Status on Billing Screen
- Exception Report

Unique Coverages

Check the appropriate Line of Business
- Coverage Code
Presented for ASCnet by Donna J. Barr, AVP, Marsh Inc.

- **Description**
  Allows Descriptions to replace Coverage Codes for coverages that appear in Remarks & Notepad

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**Claims**

**Claims Download**
- Accept Claims Download
- Update Existing Claims: if not selected all claims will go to suspense

**Claims Activity Set Up**
- Activity Option for each Transaction Type
  - Can select to leave activity open or to close
  - Suggested to use separate activity codes to identify download vs. non-downloaded transactions
Presented for ASCnet by Donna J. Barr, AVP, Marsh Inc.

**Initial Load**
- A one time download of all policies from a carrier to the agency
- Initial Loads are only supported through Applied Systems not through the IVANS Network

**Preparing for an Initial Load**
- Complete the Download Request Form
  - Select Services
  - Select Data Services
  - Select Download Request Form
- Applied Requests the Company Data
  - You may be asked to contact your company directly to request the initial load or daily download
- Dates are coordinated
  - Activation date (if applicable)
  - All companies sending data
- Carrier will start the IVANS registration process
  - Required for Daily Download after the Initial Load
- Carrier provides the data to Applied
- Carrier suspends Daily Download
- Applied Then:
  - Formats the data into the proper file structures
  - TAM Agents:
    - Sends the data to the agency via a CD
  - TAMOnline Agents:
• Data is placed on the appropriate directory
• Enables The Forms/Interface Batch Back Module if Daily Download will be used

**Running the Initial Load**

- Download Services will contact the agency
  - An appointment is scheduled to begin the Initial Load
- Policy Number Configuration is run
  - Formats the policy number into the same format the carrier is using on the download
  - It is not always possible to configure the policy numbers correctly
  - Policies that have policy numbers in a different format than the company will be placed in Suspense
- Setup Options
  - Agency and Company Files must be Setup to accept the Initial Load
  - A Download Services Technician will walk you through these options
- Preliminary Initial Load
  - A Download Services Technician will walk you through running a small portion of the Initial Load
  - Communication Log is printed
  - Policies are assigned out of the Suspense File
  - Several Policies are reviewed to ensure the Initial Load is working properly
- The Agency completes the Initial Load
  - The steps taken for the Preliminary Initial Load are repeated until all data is processed
- Agency will contact Applied when the Initial Load is complete
- Applied contacts the Carrier
  - Notifies the carrier that the Initial Load is Complete
  - Approves the start/re-start of Daily Download

**Daily Download**

- The process of transferring data from the carrier to the agency to update TAM
- Guarantees synchronization between Agency and Carrier
- Notifies Agency of Carrier Initiated Transactions (i.e. renewals, cancellations, etc.)

**Enabling Daily Download**

- Complete the Download Request Form
- The Batch Back Module is enabled
  - IVANS registration information is required prior to this step
- Communication Support will contact you to complete the following:
  - Agency File Setup
  - Company File Setup
  - Connectivity Test
- The carrier will be notified that you are ready to receive Daily Download
- Night Utilities
  - The download is run and processed overnight
- Daily Batch Transmissions
  - Select
    - Utilities
    - Company Interface
    - Batch Processing
    - Transmit to IVANS
**Batch Upload**
- The process of transferring data from the agency to the carrier for new business, policy change, and first notice of loss

**Upload Setup**
- Before Beginning Upload
  - Agency Contract Numbers must be setup in TAM
  - See the Download Setup slides
- Select
  - Utilities
  - Company Interface
  - Company File Interface Setup
  - Upload Tab
- Company IVANS Information
  - This is the account that upload will be sent to
- Receive Screen Edits Account Info
  - If the company is transmitting company unique screens and edits to you, this is the IVANS account they are sending the information from
  - This will allow screens and edits to be installed automatically through the download process
  - Enter this information on all issuing company codes that you have in TAM for the carrier
- Compression Type
  - Your carrier or Communication Support will tell you which compression type to select
- Personal Lines, Commercial Lines, and Miscellaneous Tabs
  - Select the Format for Upload
    - PRT – This transmits data in AL1 format
    - MAC – This transmits data in AL3 format
  - Personal Lines Tab
    - Indicate if the Insured Name should be transmitted in Family Format
    - Your carrier or Communications Support will tell which format to select
- Company Forms Tab
  - Your carrier will notify you if this option should be used
- Night Utilities
  - The upload is run and processed overnight
- Daily Batch Transmissions
  - Select
    - Utilities
    - Company Interface
    - Batch Processing
    - Transmit to IVANS
- Night Utilities and Daily Batch Transmissions process Upload and Download in the same session
Company Unique Screens and Edits
- Carrier specific fields added to standard applications and forms
- Carrier specific edits and tables

Unique Screens & Edits
- Sent from the Carrier to the Agency
- IVANS Download
  - Enter the IVANS Account and User Id in the Company File Interface Options
  - Screens and Edits are installed automatically through download
- E-Mail
  - Contact Communications Support for Installation

Company Unique Screens
- Screens are installed on the agent’s system
- Associated with the Issuing Company Code
- Appear in the last tab of the application or form
- Edits Appear as you are entering data for the carrier
- Additional Edits are checked when queuing a form for print or transmission
- Edits are also checked via WebEdits for Real-Time transactions
Direct Bill Commission Download & Automated Download Invoicing (ADI)

- Interface 101
  - You can’t use both Direct Bill Commission Download and ADI for a company.
- ADI
  - Used when you invoice based on written premium
  - You control what carriers will update TAM
- Direct Bill Commission Download
  - Used when you invoice based on earned premium
  - The carrier must be certified for download of Direct Bill Commission Statements
  - You request the download from the carrier
- New Import Direct Bill Transactions
  - Import Carrier Commission Statement

Direct Bill Download Setup

- Select
  - Utilities
  - Company Interface
  - Company File Interface Options
  - Download Tab
  - Download Options Tab
- Accept Batch Back Direct Bill Commissions
- Update Billing Screen on Direct Bill Transactions Received
  - Options
Automated Download Invoicing Setup

- Select
  - Utilities
  - Company Interface
  - Suspense File
  - Automated Download Invoicing or Automated Transaction Download
- Run the ADI Setup Wizard
  - Select Setup
    - Highlight the Carrier
    - Click Association List
    - Select a Transaction Accounting Type from the drop down box
    - Select a Status Type from the drop down box
    - Click on the associated ACORD Transaction Type to the left
    - Click OK
- Run the ADI Setup Wizard (continued)
  - Select
    - Update
    - Invoice Direct Bill
      - Select the Lines of Business
      - Select the Transaction Types
    - Invoice Agency Bill
      - Select the Lines of Business
      - Select the Transaction Type
  - Click OK
ADI Daily Maintenance
- Select
- Utilities
- Company Interface
- Suspense File
- Automated Download Invoicing
- Invoice
- View Log

*Working with Download and Upload*

**Queuing Forms for Upload**
- Follow the same procedures as queuing a form for print

![Print/Communication Window](image)

**View Queued Forms**
- Select
- Utilities
- Forms
- Print and View Queued Forms
- Allows you to get a listing of all forms queued for batch upload
- Use as a cross reference to the Communication Log to verify that all forms that were queued were uploaded

**Batch Transmissions**
- Select
- Utilities
- Company Interface
- Batch Processing
- Transmit to IVANS
- Sends Upload Data to IVANS
- Receives any Data for the Agency
  - AL3 Downloaded Policies & Commissions
  - AL1 Forms / Memos
  - Company Unique Screens & Edits
- Updates Downloaded Policies
- Installs Screens and Edits Received

**Communication Log**

- Contains:
  - Policies and Forms Uploaded
  - Policies Downloaded
    - Check Status for Policies in Suspense
  - Forms Received
  - Errors
- Review the Communication Log after EVERY Batch Transmission

**Communication Log – Errors**

- Error were found in Files Received
  - File could not be read
  - Possible problem with the carrier
  - Contact Communications Support
- Errors were found in Policies Received
  - Possible Line of Business Received that is not supported in download
- No Policy Type Code Entered for Company
  - A Line of Business was received that is supported for download
  - The Company File Interface Options are not set up in the agent’s system

**Communication Log-Tricks for prior to 9.0**

- Creating and Electronic Copy prior to 9.0
  - TAMGLOB.INI
    - [Comlog]
    - DuplicateAplog=1
  - Creates:
    - TAM\SAV\ComLog.xls
- This file can then be viewed using Excel

**Reprint Communication Log**

- Select
  - Utilities
  - Company Interface
  - Miscellaneous Download Utilities
  - Reprint Communication Log
- Reprints all Communication Log entries since the last Pack and Reindex was run
Forms Received
Select Utilities, Company Interface, Print Forms Received
- Prints messages sent in AL1 format
- Access this option to print items listed on the Communication Log under Forms Received
- Some carriers use this format to send edit error reports on uploaded transactions

Suspense File
Select Utilities, Company Interface, Suspense File
- Policies in Suspense
  - Assign Client IDs
  - Run Update
  - Reasons why Policies go to suspense
    - Policy Number is in different formats between TAM & Carrier
    - Policy is New and Customer Code wasn’t sent
    - Company Code Doesn’t Match
- Claims in Suspense
  - Assign Client IDs by Claim # or Policy No
- Commissions in Suspense
  - Assign Client IDs
- Automated Download Invoicing
- Reprocess Policies in Suspense
  - Fix the reason why a policy went to suspense
  - Reprocess the policy without assigning the Client ID.

Transformation Station (TS)
- Real-Time Transaction Processing
- Connection to Carrier Web Site
- Alerts

Installation Guide
Click Transformation Installation Guide
Contains carrier specific installation instructions
Requests to turn on Real-Time for a carrier can be sent to: tsrequests@appliedsystems.com

Account Update Wizard
- Select the Real-Time Butterfly
  - Home
  - Account Update Wizard
- Run weekly
- Sets up new carriers
- Sets up new transactions available
- If not run, reminders at 30, 60 and at 90 days you are turned off until you run it
Contract Numbers
- After running the Wizard, setup the contract numbers for each company
  - Select
    - Company File
    - Options
    - Agency Codes

User IDs and Passwords
- Select the Real-Time Butterfly
  - Home
  - Local Security Products
- Users can re-set and maintain their own IDs and Passwords
  - Select Carrier Product and Edit
  - Can select multiple products for one carrier
  - Enter ID & Password
  - Finish
**Real-Time Configuration Utility**
- Select the Real-Time Butterfly
- Home
- Real Time Configuration Utility
- Maintain Products
- Maintain IDs and Passwords for all users
- Account Update for missing users
Alerts!

- Select the Real-Time Butterfly
  - Home
  - Alerts
    - Alerts!-this is where alerts are requested on-demand
    - Alerts! Codes Setup-this is where the Alert! Codes are assigned to the agencies
    - Activity Codes
    - Alerts!-Suspense File-this is where any Alerts! that did not attach automatically are held to be reviewed.
### Alerts - Codes Setup

<table>
<thead>
<tr>
<th>Description</th>
<th>Acceptance</th>
<th>Activity Category</th>
<th>Assign...</th>
<th>Attachment Category</th>
<th>Attachment SubCategory</th>
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<tr>
<td>Account Current Reconciliation</td>
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<td>DUMP</td>
<td>Agency</td>
<td>REALTIME</td>
<td>CORRESPOND-CLA</td>
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<td>Direct Bill Commission Detail</td>
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</table>

### Alerts Setup - 1st Notice of Loss

**Alerts Acceptance**
- Yes
- No (Delete)
- Suspense

**Activity**
- **Code**: CLAI
- **Who Assigned**: Individual
- **Who**: XY

**Attachment**
- **Category**: CORRESPOND-CLA
- **SubCategory**: 

[Image of a computer interface showing an alert setup window]
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2008 ASCnet Education    Save the Dates!
2008 ASCnet SuperSummit, Atlanta, GA: April 8 - 10
2008 ASCnet SuperSummit, Detroit, MI: May 20 - 22
CSR Boot Camp, Orlando, FL: June 10 - 11
Accounting Boot Camp, Orlando, FL: June 11 - 12
2008 ASCnet TENCon, Anaheim, CA: Sept 9 - 12

When was the last time you used the ASCnet Newsgroups?
The ASCnet newsgroups are users helping users via the Internet. The Newsgroups are not a list serve, but rather a bulletin board system allowing users to post questions in specific topic areas.

By using the newsgroups on a daily basis, users can utilize experience and receive help from other users, without geographical limitations. The newsgroups are an outstanding resource to help you prepare for an upgrade, troubleshoot an issue, or just to help run your office better.

Stop by the ASCnet booth to preview! Save on shipping by placing your order at the Registration Desk.

The Fast Track Guide to Getting the Most Out Of TAM

Integrating Word and Applied
A Guide to Document & Proposal Setup in TAM and Vision

Updated (to be released Dec 2007):
The Accounting Manual
Month-End Made Easy

Outlook Made Easy
Everyday Use & Integration with TAM & Vision

Did you know that you can customize them?
These Tools, like many of the products ASCnet offers, come formatted in Microsoft Word and allows users to edit to their agency specific policies and procedures. Use the Discounted Conference Order Form!

Which ASCnet Tools Do You Need?

Visit www.ASCnet.org/newsgroups